EVALUATION OF LABOUR CANADA'S
LABOUR EDUCATION PROGRAM
(1977-1981)

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EVALUATION OF LABOUR CANADA'S
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Introduction and Highlights

The original intent of the Federal Government in providing financial support to the labour movement to increase its activities in labour education was to achieve the following objectives:

1. To improve the capacity of individual members of labour organizations to understand the nature of their unions, the Canadian labour movement, and their roles as members of their communities; to improve the skills of members to enable them to fulfill the various specialized roles demanded of them as officers of labour organizations;
2. To improve the capacity of labour organizations to play larger roles in the society and to contribute to economic and social development and stability;
3. To contribute to smoother industrial relations in Canada; and
4. To improve the equity with respect to the share of different groups in the society in resources for education.

On the basis of our observations of the four years of the Labour Education Program under review in this report, we believe that the Program should be renewed. We are convinced of the value of the Program and of the immediate and long-term benefits to the people of Canada as well to the labour movement.

The establishment of labour education activities required the labour organizations to choose between making their own programs and resources by developing and designing educational programs, preparing and producing course materials, implementing and instructing courses, and training and utilizing staff members to accomplish these tasks, and buying those services and resources from private or public educational agencies. In limited numbers of cases, labour organizations drew on the expertise of consultants, particularly lawyers, and bought learning resources from external organizations. In choosing to make, rather than buy programs, materials and expertise, labour organizations have substantially extended an alternative system of adult education in Canada.

The Labour Education Program must be judged a success even if the objectives of the Federal Government had only been limited to reaching individual adults who had not been served by existing educational programs and facilities. However, there is also evidence of growth and maturity among individuals, quality in the performance of labour and community roles, and the exercise of good judgment on the part of the providers of educational programs.

Equity has been served with respect to providing alternative educational opportunities which are perceived by members of labour organizations as relevant to their needs. And while smoother industrial relations has proven to be a somewhat slippery category, we have been told by two-thirds of the participants we surveyed that they have acquired a greater comprehension of the position of management.

There can be no certain measure of the improved capacity of labour organizations to play their role in Canadian society. However, the commitment of the Federal Government to the use of funds for education implies a belief that the provision of education for individuals within labour organizations would contribute to this objective in the long run. There is evidence that individuals who have participated in various educational programs have moved into positions of leadership within various labour organizations and community activities. This evidence can be accepted as movement toward the achievement of the objective of increased contributions to Canadian society. Finally, evidence supplied by the participants whom we surveyed indicates overwhelmingly that most felt more competent in the performance of their various roles in their organizations.

This report is divided into six chapters devoted to a description and assessment of the Labour Education Program itself, of the provision of financial assistance to the federations of labour organizations through five-year contracts, of the provision of annual grants to independent labour organizations, of the financial support offered to individuals through the Bursary program, and of the financial contributions made to post-secondary institutions.

The final evaluation of any educational undertaking must be in terms of who learned what, if anything. Therefore, Chapter One is devoted to reporting on and analyzing individual responses to our telephone survey of individual participants in various educational activities funded, at least partially, through the Labour Education Program. The questions used in the survey were based on the development of indicators (see Appendices B, D, E and F) of success in the achievement of the original objectives of the Labour Education Program (see restatement, Appendix C).

Chapter Two is devoted to a review of the analysis of our telephone and mail survey of two groups of participants. First, we review responses from participants, collectively referred to as the "Independent" sample, in educational programs mounted by independent labour organizations. Then we provide brief case studies of 11 of these organizations. Finally, we review the responses from participants in the educational programs mounted by the Canadian Labour Congress through the Labour Education and Studies Centres, Labour College and Atlantic Region Labour Education Centre, and by the Canadian Conference of Teamsters. These respondents are dealt with collectively as the "Contract" sample.

Chapter Three is devoted to a summary of developments with respect to administration, participation patterns, program and resource development, finances, and evaluative procedures used within Labour Canada, the independent labour organizations, the Candian Conference of Teamsters, and the Canadian Labour Congress.*

Chapter Four provides summary reviews of those components of the LEP which provided financial contributions to post-secondary institutions and bursaries to individual members of labour organizations.

Chapter Five focuses on resource development in all components of the LEP and provides the reader with a number of independent reviews of selected resources from a variety of labour organizations.

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*For abbreviations used within this Report, see Table 1-2. For common abbreviations used for labour organizations other than those selected for review in this Report, refer to the Directory of Labour Organizations in Canada: 1981 (Ottawa: Supply and Services Canada, 1981).

Chapter Six offers some international comparisons between the Canadian program of support for labour education and programs of support in other countries, particularly the United Kingdom, France, Denmark, Germany, Sweden and Australia.

Highlights

A. Individual Participants

1. Ninety percent of the individuals surveyed reported that they felt more self-confidence as an outcome of their participation in an educational event.
2. Two-thirds of respondents reported an increase in their understanding of the position of management.
3. Ninety-five percent of respondents reported that they wished to take part in more labour education activities.
4. While participation in educational programs levelled off in the third and fourth years of the Labour Education Program, participation in these two years was almost double the participation levels in the first two years.
5. Levels of participation were highest in the areas of Training and Education, Health and Safety, and Collective Bargaining; and lowest in the areas of International Scene, History of the Labour Movement, Labour's Role in the Community, and Social, Political and Economic Affairs. The variance in participation in various topic areas over four years suggests that Training and Education, Collective Bargaining and Labour Legislation will be important ongoing topic areas; and that participation in such topics as Conditions of Work, Welfare Programs, and Health and Safety tend to be strongly affected by changes in economic conditions and in new legislation affecting the worker and the workplace.
6. Most participants in educational programs are selected or appointed officers, officers-designate, and staff members of

various labour organizations.

7. Two thirds of the individuals surveyed were unaware that Labour Canada had made a financial contribution to the educational activities in which they had participated.

B. Labour Organizations in General

1. Participants in labour education programs, as a proportion of total memberships in labour organiations, is very small--less than three percent. However, since the objective of the Labour Education Program is to develop competent leaders and most of the participants who took part in educational programs had alreay assumed, or were about to assume leadership roles, a fairer estimate of success would be to view participants as a proportion of the numbers of individuals occupying leadership roles in their various labour Labour Organizations in General. This proportion was impossible to calculate for this report. In the same context, we think it is acceptable to be less concerned about repeaters among participants since there is some evidence that repeated participation indicates individual development, and hence of leadership development.
2. Most of the problems identified in this report--problems of information, selection of participants, sequencing of course and materials, and so on--arose from the successes achieved during all four years of the Program.
3. The Administrative arrangements established in the first two years of the Program continue to operate efficiently through

the third and fourth years.

4. Labour organizations with five-year contracts which contained financial protection against inflation, took advantage of the security provided to develop some excellent learning resources and to train competent instructors. No comparable development is evident with respect to the independent labour organizations which must apply on a yearly basis for unpredictable levels of financial assistance.
5. A balance of short-term goals, such as course planning and implementation, and long-term goals, such as development of learning resources and sequenced courses, has been maintained, particularly with respect to those organizations under five-year contracts.
6. To the extent that expenditures of federal funds is reported in ways which are visible and can be scrutinized by the evaluators, the funds have been handled with care and good judgement. Initial surpluses in those organizations under five-year contracts have been used to defray expenditures in subsequent years of the Program. The initial caution in spending helped to avoid the creation of unrealizable expectations.
7. To the extent that spending on educational activities is not visible--for example, instructional expenses are not reported, but are included in staff salaries or the administrative expenditures of affiliated organizations--the real amount of spending on labour education cannot be determined and, therefore, cannot be assessed against the

financial support provided by the Federal Government.

8. Labour organizations appear to be increasingly providing educational activities during working hours and are attempting to pay participants' expenses so that individuals do not suffer undue hardships from wage loss. The expenses of most participants are covered by their local labour organizations or by a central coordinating labour organization.

9. While some organizations report that their educational activities might be reduced or cancelled if financial support offered through the Labour Education Program were reduced, our survey indicates that pressures from local organizations would probably be exerted on central labour organizations to maintain educational programs and on the Federal Government to maintain its current level of financial support.

10. Most labour organizations have elected to develop and produce their own educational resources and programs rather than contracting for these services with educational agencies. The development of programs and resources has proceeded carefully, with due attention being paid to the assessing of needs, the establishing of objectives, the testing and revising of both courses and related educational materials, and the assessing of future needs for long-range planning and the controlling of costs. The print resources produced by labour organizations have generally been of a higher calibre than the audiovisual resources.

C. Independent Labour Organizations

1. Education, health, and government-related labour organizations accounted for 83% of all grants made in the four years under review.
2. An analysis of the costs of programs supported in whole or in part by the Labour Education Program indicates that for every $1.00 contributed by Labour Canada, the independent labour organizations have contributed, on the average, an additional $1.85.
3. Program offerings to the general membership have declined somewhat over the four years under review, while offerings for elected officers and staff members have increased.

D. Canadian Conference of Teamsters

1. The educational programs developed by the Teamsters have tended to be devoted to basic tool courses for shop stewards and business agents.
2. A general policy was introduced whereby reimbursement for lost wages was discouraged. To this end, educational programs were developed and managed entirely on a regional basis to reduce travel costs and time away from work.

E. Canadian Labour Congress

1. The total amount of educational activities within the Congress and its affiliates has increased over the four years under review with significant increases in additional funding provided and services offered.

2. Considerable resources were devoted to a national program of instructor training, and in the fourth year to advanced instructor training.
3. The administrative structures and procedures defined in the agreement between the Congress and Labour Canada are in place and appear to be working well.

F. The Federal Government

1. The Federal Government has developed, through Labour Canada, a unique supportive relationship with organizations in the labour movement in Canada, a relationship which exists in few, if any, other jurisdictions or sectors of Canadian society.
2. The Labour Education Program appears to be a model of direct federal intervention into education, a model which could be used in programs currently being developed in other sectors. It is also clear that information regarding the extent of federal support for labour education is not known as widely as might anticipated or desired, even among participants.
3. It is clear that, in terms of development over the four year period of the Labour Education Program, those labour organizations which received five-year contracts benefitted from the resulting financial security, while those which were required to apply annually for financial assistance did not show the same level of development in their educational programs.

4. It would appear that independent labour organizations, particularly small organizations, would benefit from qualitative assistance from Labour Canada, in addition to financial assistance.
5. A consequence of the financial assistance provided by the Federal Government, of the administrative procedures used in the Labour Education Program, and of the current evaluation of the activities being carried out, mean that Labour Education is the best documented program of adult education in Canada.
6. The Labour Education Program was administered with a relatively small staff both nationally and regionally. These staff members have devoted considerable time and energy to devleoping and maintaining good relationships with grant recipients and have actively participated as members of advisory committees associated with the educational programs developed by those federated labour organizations which received contracts.

G. The National Advisory Council on Labour Education

1. The Council was formed as required and, by means of the only two meetings held, appears to have contributed to the realization of the stated goals of the Labour Education Program.
2. The Council was disbanded in the second year of the Program on grounds associated with only one of its six stated objectives and on grounds of economic restraint in federal

government spending.

H. The Post-Secondary Program

1. The Post-Secondary Program was terminated in the second year on grounds associated with economic restraint in federal government spending.
2. Research projects which were adequately funded were completed and were of direct value to labour education. There appears to be little evidence of continuing commitment to labour education by those institutions which received post-secondary contributions for research purposes.
3. There was considerable growth in the development of non-credit courses but not as much growth in the expansion of credit programs of labour studies.
4. Several post-secondary institutions, particularly those with active labour studies programs, were involved in contractual arrangements with independent labour organizations for the purposes of designing and implementing specific programs and materials.
5. In some cases, the financial contributions received in the first year stimulated program development; and the increased activity attracted additional financial support from sources both internal and external to the post-secondary institutions.
6. In some cases, the termination of the post-secondary contributions resulted in the termination or curtailment of labour studies programs.

7. The contributions to post-secondary institutions stimulated the development of cooperative relationships between local supporting labour organizations and recipient educational agencies.
8. Only one post-secondary institution was able to conform to the requirement that funded programs of study or research be completed within one year. At the end of the fourth year one funded program had still not been completed.

I. The Bursary Program

1. Over the four years under review seventeen bursaries were awarded to fourteen individuals, three women and eleven men.
2. The decision to support an individual over more than one year of study or research tended to limit the number of individuals who could be funded, but resulted in a high completion rate. Only one individual was unable to complete a funded program of studies.

Recommendations

1. Labour Canada should regularly and systematically assess the experience and opinions of the regional officers with respect to the functioning of the Labour Education Program. This assessment should be undertaken in order to increase the commitment of the regional staff to the LEP and to increase their understanding of what is expected of them in relation to the LEP. Staff members and Regional officers should have opportunities to engage in educational activities designed to promote their own development, knowledge, and expertise.
2. Labour Canada should review the basis on which independent labour organizations are now funded. Consideration should be given to not only increasing the amount of funds available to the independent labour organizations, but also to establishing some minimum level for individual grants.
3. Labour Canada should consider the provision of qualitative assistance, as well as financial assistance, to the small independent labour organizations. A reconstituted Advisory Council and/or a Labour Education Commissioner could perform such a role.
4. The original agreement with the federations called for an external evaluation of the programs at the end of the second and fourth years. These evaluations have been completed with evidence of benefit to all parties. At the same time there is evidence of the development of procedures and relevant activity for evaluations being conducted by the federations themselves. Labour Canada should now begin discussions with

the federations and with the independent labour organizations with respect to basing the future evaluations on the information collecting activities now being undertaken by the various labour organizations.

5. If Labour Canada wishes to achieve a greater degree of equity with respect to the provision of financial assistance to independent labour organizations, it must review the system by which information and funds are made available: that is, a minimum grant should be instituted for each independent labour organization in place of the current system of imposing a maximum limit on the total available and then dividing this amount on a strict per capita basis among applicants.
6. Independent labour organizations should be encouraged, with the assistance of Labour Canada, to share educational resources where common interests and concerns exist.
7. Labour Canada should explore the extent and nature of evaluation activities within the independent labour organizations, with the intent of making use of such information in regular reporting procedures and as a basis for future large scale evaluations of the Labour Education Program. Labour Canada should assist independent labour organizations in the development of simple, practical and regular evaluations processes.
8. Labour Canada should review the system of reporting which is now required of independent labour organizations with the object of obtaining more standardized information. Such

standardized information would be of value to both Labour Canada and to the independent labour organizations.

9. Labour Canada should develop, in cooperation with the independent labour organizations, acceptable means whereby federal contributions to educational activities receive greater and more systematic recognition.

10. The Canadian Conference of Teamsters through its Educational Advisory Committee should consider the development of educational opportunities which will maximize the national focus of programs to encourage cooperative and national efforts within the organization. This recommendation does not minimize the importance and necessity of regional events.

11. The Educational Advisory Committee should ensure the regular provision of educational opportunities for senior officers of the Canadian Conference of Teamsters with a focus on Canadian issues and organizational concerns.

12. The Canadian Conference of Teamsters should engage in utilizing this assessment, among others, of their educational activities to date, as a basis for formulating long-range plans for future development. To this end, the Teamsters might consider the possibility of having the Administrative Committee meet more than once a year and of creating a small educational planning and resource group within that committee.

13. The Administrative Committee should devote special attention to the present use and future potential of the audio-visual equipment obtained with the assistance of federal funds.

14. The Administrative Committee should evaluate the policy of library development and usage and of resource acquisition with respect to their value for the educational programs, in addition to their value for other organizational activities.

15. The Administrative Committee should consider the development of simple, yet systematic, means for the collection of information about participants, interests, needs, and achievements associated with their educational programs. Such activities need not burden program staff and would contribute to more effective and efficient planning.

16. The Congress should proceed to implement the bulk of the recommendations contained in the "Report on an Evaluation of the Atlantic Region Labour Education Centre: March 1972 to February 1981". We believe that this report presents a fair, accurate and thoroughly competent evaluation and is deserving of the most serious consideration.

17. Since there is no program similar to ARLEC in any other regions, the Congress should, on the basis of the existing evaluations, explore the value of establishing a comparable program in other regions, including similar relationships with post-secondary educational institutions.

18. The Congress should examine its policies for staffing educational positions, particularly within the LESC, to improve long-range opportunities. Comparable experience in other organizations, both in Canada and abroad, might be examined with special attention being given to the development of a system of staff rotation over fixed periods

of time.

19. The Congress should review rates of participation by members and officers of affiliated organizations and directly chartered local unions, with a view to encouraging increased participation from small organizations, particularly those without education officers.

20. The senior officers of the Canadian Labour Congress, in cooperation with the educational leadership of the Congress, should continue to give attention to the need for developing planned educational opportunities for the senior leaders of the Congress.

21. The Congress should identify problems associated with the selection of participants. To this end, the Congress might give consideration to the formation of a group of both educational and non-educational members to explore the implications of various types of selection factors.

22. The Congress should address itself to the problem of providing adequate information to all locals, all affiliates and all prospective participants in advance of educational events.

23. The Congress should review, with the mechanism utilized for that purpose, its program planning experiences and decisions of the past five years in order to determine the efficacy of these experiences and decisions and to develop long-range plans for future programming.

24. The Congress should consider the evolution of an institute or program of advanced studies in Labour Education and should do

so using the experiences obtained through the operation of the Labour College and in cooperation with as many other labour organizations as are interested.

25. The Congress should avoid the possible isolation of the national LESC office and its staff from direct involvement in the educational experiences of others, while at the same time encouraging experimentation with new roles and educational activities for the Centre and supporting the personal educational activities of all staff members.

26. The LESC should review its production of audio-visual materials in the light of current evaluations and of the production experiences, with a view to improving the planning and production processes, to bringing the audio-visual materials up to the same high standard achieved in the print materials, and to developing greater congruence between the print and audio-visual materials used in the same course.

27. The Congress, the LESC and the affiliated labour organizations should review all expenditures related to educational activities so that the real costs of education can be assessed. The national and regional offices of the LESC should consult in the development of standardized means for reporting on expenditures, events, and participation in educational activities.

28. Within the next 12 months, the Congress should commence a review of its system for collecting information and assessing educational programs and policies. This review should include the following objectives:

a) the integration of major evaluative undertakings such as those concerned with ARLEC, Harrison Hot Springs, the Labour College, this evaluative report, and the regular collection of information related to educational activities of the Congress;

b) an exploration of how and by whom the information collected is used and how it might be used more widely and more efficiently; and

c) the consideration of how the results of various information collection and assessment activities could be of value to Labour Canada and to other labour organizations in Canada.

29. Labour Canada should give consideration to reinstating, at the earliest possible opportunity, the program of contributions to post-secondary institutions. The continuing desire among members of labour organizations for opportunities for systematic advanced study of labour-related concerns should not be dismissed. Centres of excellence to promote studies and research of relevance to the labour movement in Canada should be encouraged.

30. Labour Canada should seek to find alternative means for fostering improved relationships between the labour movement and the educational system, with a view to increasing the access of labour organizations to the resources of post-secondary institutions.

31. Labour Canada should review the application forms for the bursary program with a view of clarifying the guidelines for

proposed courses of study for credit.

32. Labour Canada should clarify the intent of the bursary component of the LEP and should give serious consideration to increasing the total amount of funds available for ursaries and the total amount of funds available to any one individual in one year. Guidelines should be established which more clearly define the intent of the program in terms of offering support for long-term or full-time study, for short courses, and for research projects or the development of educational materials.

33. Labour Canada should develop a library of resource materials drawn from those which have been developed and used in labour education activities and should encourage cooperative efforts among labour organizations by which the expertise which has been developed by various labour educators in the past four years can be shared throughout the labour movement in Canada.

Factors Affecting the Evaluation

The Original Terms of Reference

The contracts (see Appendix A) under which the present evaluation was completed required that activities of the first four years of the Labour Education Program be studied. Specifically, we agreed:

a) to assess the processes and scope of labour education activities funded by the LEP, to pay specific attention to the geographic, demographic and functional aspects of the program, and, where possible, to assess the quality of the product (i.e. the competence of members of labour organizations to perform their organizational and community responsibilities through the application of their learnings);

b) to use an evaluation process and questionnaire previously developed; and

c) to make recommendations, whenever possible, on ways and means for improving or expanding the delivery and utilization of the LEP.

When the LEP was established on May 20, 1977, it was noted that a timetable for evaluating funded activities would be part of the contractual agreement signed between the Canadian Labour Congress, the major recipient of LEP funds, and Labour Canada. For its part, Labour Canada noted that a similar schedule would be followed in evaluating the various other components of the LEP which were under its direct administration. The timetable was established as follows:

May 20, 1977	Contract signed between Canadian Labour Congress and Labour Canada. Announcement of LEP by Minister of Labour.

July 1, 1977 to June 30, 1978	First program year of LEP.
July 15, 1977	Contract with Congress tabled in House of Commons.
August 18, 1977	Announcement of LEP components including contributions to post-secondary institutions, bursaries to individuals, and grants to independent labour organizations; and of creation of National Advisory Council on Labour Education.
December 22, 1977	Contract signed between the Canadian Conference of Teamsters and Labour Canada.
January 15, 1978	Contract signed between the Confédération des Syndicats Nationaux (CNTU) and Labour Canada.
May 15, 1978	Announcement of funds available for second year of LEP for post-secondary institutions, bursaries, and grants to independent labour organizations.
May, 1978	Submission of evaluation proposal to Labour Canada by OISE. Proposal based on final report of preliminary investigation of an evaluation model for use by Labour Canada by Abbey and George (Labour Canada reference 77-204).
July 1, 1978 to June 30, 1979	Second program year of LEP.
July, 1978	Contract signed between the Centrale des Syndicats Démocratiques (CSD) and Labour Canada.
August, 1978	Cancellation of LEP components dealing with National Advisory Council and contributions to post-secondary institutions.
April 2, 1979	Announcement of funds available for third year of LEP for bursaries and grants to independent labour organizations.
July 1, 1979 to June 30, 1980	Third program year of LEP.
January, 1980	Discussions between OISE, Labour Canada Treasury Board to conduct evaluation of activities of LEP.

February 1, 1980	Announcement of funds available for fourth year of LEP for bursaries and grants to independent labour organizations.
March 1, 1980	Contract signed between OISE and Labour Canada to conduct preliminary evaluation of first and second years of LEP. Co-funding received from the Congress, the Teamsters, the CNTU and the CSD. Period of contract: February 1, 1980 to September 30, 1980. File nos. 3925-52. Contract D1 (14).
July 1, 1980 to June 30, 1981	Fourth program year of LEP.
September, 1980	Negotiated change in contract to transfer responsibility for franchophone constituency of LEP to the University of Montreal.
September 30, 1980	Submission of Report of Preliminary Evaluation to Labour Canada as following reference: Thomas, A.M., Abbey, D.S., Finestone, P., and Wyles, I. "Labour Canada's Labour Education Program: Preliminary Evaluation, The First Two Years (1977-78 and 1978-79)".
December 23, 1980	Release of English and French Preliminary Reports by Labour Canada.
January 21, 1981	Recommendation to Treasury Board from Labour Canada for funds to complete second and final evaluations of LEP.
February 2, 1981	Announcement of funds available for fifth year of LEP for bursaries and grants for independent labour organizations.
March 25, 1981	Contract signed between OISE and Labour Canada to conduct second and final evaluations of LEP. Co-funding received from the Congress and the Teamsters. Period of contract: April 1, 1981 to March 15, 1982. File nos. 3925-52. Contract D1 (14).
July 1, 1981 to June 30, 1982	Fifth program year of LEP.

September 30, 1981	Submission of Progress Report to Labour Canada as following reference: Thomas, A.M., Abbey, D.S., and MacKeracher, D. "Labour Canada's Labour Education Program: Progress Report."
January 15, 1982	Submission of Report of Second Evaluation to Labour Canada as following reference: Thomas, A.M., Abbey, D.S., and MacKeracher, D. "Labour Canada's Labour Education Program: Second Evaluation, Years Three and Four (1979-80 and 1980-81)."
March 15, 1982	Submission of Final Report of Evaluation of the LEP to Labour Canada.

In the terms of reference for our evaluation, described above, we accepted the requirement and opportunity to "assess the quality of the product" *where possible*. We also accepted the task of making recommendations to improve or to expand the delivery or utlization of the LEP. Our role from the outset has been one of a critical evaluator. We have attempted not only to describe the LEP as it actually operated during its first four years, but also to assess these operations based on our understanding of good adult education principles and practices.

Evaluating Educational Programs

In this section we have attempted to clarify how we approached this evaluation, the types of decisions which were made, and the activities which followed. The reader might wish to refer to Appendix G in which we have described the various interest groups involved in the total evaluation process. Specific evaluation processes, such as a description of the telephone survey conducted during 1981, are provided in various chapters throughout the report.

The Labour Education Program is not part of a formal educational system, nor is it an educational agency. Its objectives are to fund other organizations for the express purpose of providing educational services; and while it may purchase services from some formal educational agencies, this is the exception rather than the rule. The usual criteria for evaluating the success of either the agencies or the students of a formal educational program are simply not applicable to the organizations and participants involved in the activities of the LEP. Participants seek no diplomas, write no examinations, have no degree conferred upon them, and are seldom in a program that has several hierarchically arranged or sequenced courses. The organizations which were funded are involved primarily in political and social activities in which education or learning serves a peripheral function, a function which is always subordinate to the attainment of collective protection for members through obtaining and maintaining collective agreements with employers.

It has become fashionable to decry the numbers game in the assessment of educational activities. The success of an educational venture cannot be judged solely on the quality of participants and the number of courses offered. Any judgments about success or failure must also examine the quality of the educational experiences, of the learning which results, and of the extent to which learnings are transferred to situations beyond the educational program itself.

Yet, the public funding provided to educational ventures is typically available on a per capita basis. Therefore, it is apparent that some quantitative data are important in assessing how educational activities will be funded. How numbers of courses and participation rates are used and the meanings attached to such numbers depends on who is discussing them and for what purpose.

In labour education, numbers of participants may be interpreted in different ways. Members of labour organizations often attend courses on weekends, away from home, often at considerable inconvenience to themselves and their families; or they voluntarily attend classes and participate in workshops even though they are not accustomed to the classroom or seminar environment. In such cases, the mere presence of the worker in an educational event may be used as an indicator of how such experiences are valued by individuals. Ultimately, if the premise of the LEP is correct, the educational experience of the individual worker will be translated into outcomes of value to industry and society generally. Attendance at labour education programs cannot be the sole criteria on which such programs are judged; but head counting, as one indicator of success, cannot be dismissed when many of the men and women who attend, do so voluntarily.

Formal educational systems operate within large administrative structures, are staffed by professional administrators, and enjoy (or suffer from) legislation which both funds and controls their operations. The university in Canada is governed by a board, enjoys academic freedom of inquiry, and may be blessed with tenure for its faculty, but it is still state-controlled with respect to the majority of its funds. Labour education programs, in contrast, have typically been paid for from the dues collected from the membership. A small independent labour organization, located in a small community, has almost no opportunity to receive support for educational activities which it might wish to design and conduct and almost no resources to design and implement its own. Its members may enrol in a labour studies program mounted by another organization or educational agency, but such programs may be only partially relevant to the independent organization. A small local of a national or international labour organization may be able to send one or two members to educational activities operated by the central organizing body, but this issue of relevancy still remains. Any educational program which does not meet the needs of the labour organization or the individuals it sponsors will find that attendance drops very rapidly and that verbal complaints are swift to arrive.

Economy, efficiency and effectiveness have become the three basic outcomes or criteria by which educational programs are frequently evaluated. There are many ways to define each term and each provokes a series of questions suggesting information which might be gathered and used to evaluate each outcome. For example:

Economy: Does the educational program provide for the best possible outcomes while using up the least possible resources? When materials or programs are purchased, were competitive prices examined? Were tenders asked for? Are cost-recovery programs operating where these are appropriate? Are revenues which could offset costs being collected?

Efficiency: Does the educational program provide for an optimal balance between outcomes and resources? Are there any redundancies in the management of the program which could be eliminated? What are the ratios of program benefits to costs for vaious portions of the program and could these be improved? Could improved decision-making reduce costly delays and waste?

Effectiveness: Are the stated objectives of the program being achieved? Are these objectives still relevant? Are there alternative means for achieving objectives? What are the relative costs and benefits of various alternatives to the program being evaluated?

Note that criteria to judge effectiveness--or the extent to which the intended objectives were achieved as outcomes of the educational experience--must be distinguished from criteria to judge effects--or the actual consequences of the educational experience, whether intended or unintended. If an educational program is designed "to offer an enriched experience" or "to present new management techniques", then the intended objecties are "to offer..." and "to present...". These programs could be judged effective so long as the only criteria used is whether the designated experience was actually offered or the new management techniques were actually presented. Objectives about what is to happen to the participants in these programs or what they will be able to do as a result of these programs are not specified. As a result, if there is any change in participant behaviour, these changes are technically only the effects of having been in the program and cannot be used to measure effectiveness.

In the present evaluation, we have not concentrated on issues of economy or efficiency. Wherever possible, we have collected readily available data on costs and have commented on decisions to develop educational programs and materials rather than buying or contracting for these from other agencies. Our primary focus has been on issues related to effectiveness. To this end we developed a list of indicators (see Appendices B-F) by which we could gather data to assess the extent to which the LEP was meeting its stated objectives, both as a total program and in its component parts. Whenever possible, we have also addressed the issue of the effects of the program, particularly when these effects were unintended or unexpected.

We discovered, too, that our evaluation had unexpected effects. For example, when we asked for information which did not already exist in some form or which was not being collected, the effect of our question was to precipitate changes in the information collecting systems of various groups. In the first year of the program, no evaluations were collected from those independent labour organizations which had received grants. A descriptive evaluation form became mandatory in the second year. On this evaluation form, funded organizations were asked to report on the extent of their own internal systems for gathering evaluative information. In the second year none of the funded organizations were gathering such information; but by the end of the fourth year, only one organization was not gathering such information. The question itself appeared to have had the unexpected effect of changing organizational behaviour.

Summary of Decisions

The following decisions were made by the OISE Research Team which affected the processes used in this evaluation, the final format of this report and the conclusions drawn.

1. Since there had been no systematic data collection for labour education in general and for the Labour Education Program as

a whole, the present evaluation has had to depend on existing data, on interviews with knowledgeable persons, and on the collection of information via systems which were established during the first four years of the program.

2. Resources were invested in clarifying the requirements of the evaluation, in specifying the objectives of the LEP, and in identifying the major constituency groups which played a role in the development of the LEP.
3. We attempted to identify indicators of effectiveness for the LEP and attempted to test some of these through various means including personal interviews, review of descriptive and financial data on file with Labour Canada and in the annual reports of various labour organizations, and telephone and mailed survey results.
4. We initially attempted to review the LEP activities which were being carried out by francophone organizations in Quebec. When this activity proved to be incompatible with francophone expectations, we agreed to coordinate our work with that of colleagues at the University of Montreal. Time and funding pressures led us to abandon this attempt. Therefore, the evaluation of LEP activities has been conducted by two separate groups and has resulted in two independent reports.
5. We decided to evaluate all components of the LEP--contract organizations, independent labour organizations, bursarists, and post-secondary institutions, as well as to review the administrative activities of the LEP by Labour Canada.

6. We decided to review selected resources produced in whole or in part with support from the LEP. These reviews were conducted by reviewers who were external to our research team and who had various types of connections to labour education or to the labour movement.

The Focus of the Evaluation

Figure 1-a shows the relationships between Labour Canada, various components of the LEP, and the educational activities which were supported in whole or in part through federal funds. At the right-hand side of the figure we have identified three levels within the LEP, each of which required a different type of evaluation.

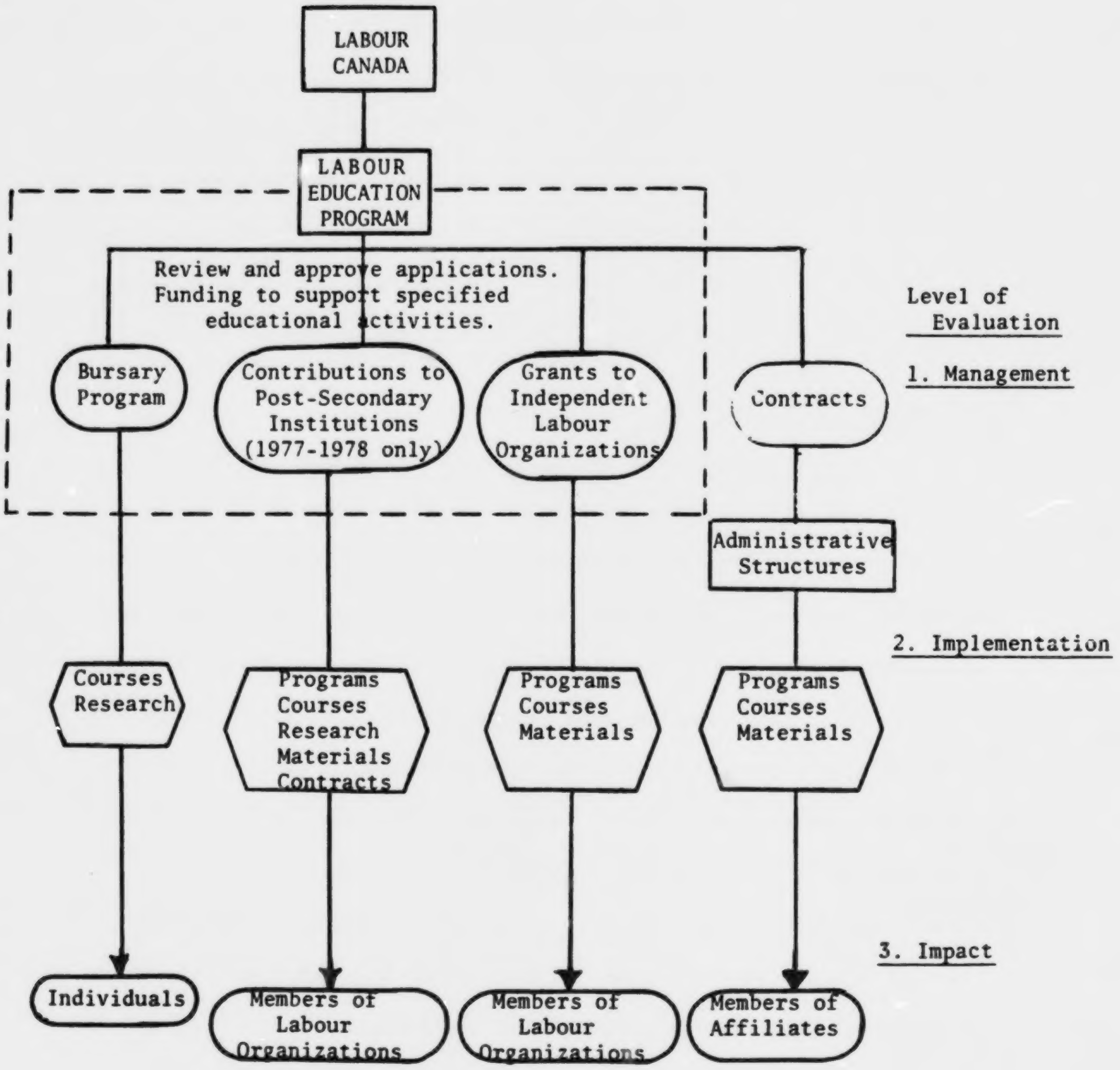
Level 1: Management

At the first level, the evaluation focused on how the LEP was actually carried out. This evaluation involved an examination of: (a) the decisions made by Labour Canada on allocating funds; (b) the means and timing for the payment of funds to various components; (c) the internal checks and balances created to ensure that funds were actually spent in support of labour education; and (d) the mechanisms by which labour organizations requested funds and by which funded recipients reported back to Labour Canada. This level of evaluation also examined the development and implementation of administrative structures by the labour organizations which received contracts, as these structures were described in the contracts. This part of the evaluation is reported in Chapters Three and Four.

FIGURE 1-a

LABOUR EDUCATION PROGRAM

Relationships among Component Parts


LABOUR CANADA
LABOUR EDUCATION PROGRAM
Review and approve applications. Funding to support specified educational activities.
Level of Evaluation
Bursary Program
Contributions to Post-Secondary Institutions (1977-1978 only)
Grants to Independent Labour Organizations
Contracts
1. Management
Administrative Structures
2. Implementation
Courses Research
Programs Courses Research Materials Contracts
Programs Courses Materials
Programs Courses Materials
3. Impact
Individuals
Members of Labour Organizations
Members of Labour Organizations
Members of Affiliates

Level 2: Implementation

At the second level, the evaluation focused more precisely on how funds were spent and involved an examination of: (a) the courses and materials designed; (b) the appropriateness of various courses and materials for various groups of learners; (c) the quality of the educational experiences offered; (d) the quality of the resource materials produced; and so on. This part of the evaluation is reported in Chapters Three and Five.

Level 3: Impact

At the third level, the evaluation became closely associated with the concept of effectiveness. The focus here was on changes in behaviour, attitudes, values, and knowledge which could be traced to educational activities funded through the LEP. Our concern at this level of evaluation was for the individual participant's satisfaction with the learning experiences and for measurable changes in his/her behaviour as a member of the labour movement and of the community. This part of the evaluation is reported in Chapters One and Two.

Excerpts from the Interviews

The following comments, taken from the many interviews conducted during the course of the evaluation project, convey something of the flavour of the responses made by representatives of the constituencies involved in the Labour Education Project.

> The growth of the labour movement means that there are thousands of new and young members without any experience of the early days and the original leaders. The labour movement has a history. It is of the greatest importance that the new members, some of them already in leadership positions, understand and feel that history.
>
> Labour Leader

> Workers are as entitled as anyone else to high levels of competence, rigour and professionalism in their programs of study.
>
> Post-Secondary Official

> We would never accept a classroom, a house, or anything from anyone outside the labour movement if there was a string attached.
>
> Former Labour Leader

> The adversary system is essential, but a well-educated or enlightened labour movement will understand it better and make it work more efficiently.
>
> Labour Leader

> We seem no longer to be regarded with suspicion, and can really contribute productively to the bodies on which we are represented.
>
> Labour Canada Officer

> Labour education is the responsibility of the labour movement. We have the right and the responsibility to develop our own people in our own way. We will not deliver our membership to anyone else.
>
> Labour Leader

> (Labour education) makes for better employer-employee relations. I have a better insight. I see the other side of the picture and know that the collective agreement is mutual but has different interpretations.
>
> Participant

Increasingly, it is not necessary within the labour movement to argue that expenditure on education is both valuable and necessary, only about how much, on what sort of education, and over what period of time.

Labour Educator

It seems crazy to me for the labour movement to reject assistance from post-secondary resources that they have paid for through their taxes. They should continue to insist that those resources be made available in ways relevant to their needs.

Post-Secondary Official

For us, evaluation comes in a very practical way. If the members don't like what they get in our schools, their unions stop sending them. We generally get the message.

Labour Educator

(Labour education) is the greatest thing we have ever had. We're naive about so many things not taught in the public school system. Many things come as a shock.

Participant

There are important ways in which labour education functions as a means of concensus development within the labour movement.

Labour Educator

I learned the types of games and strategies played by both sides. I learned how some of the techniques can backfire. I also learned. . .that a more realistic interpretation of the issues on both sides would lead to more intelligent decisions on both sides.

Participant

Given the working conditions among the Teamsters, a powerful result of the educational program has been the satisfaction arising from simply being gathered together as a group.

Labour Educator

There is a difference between labour education that provides mainly mechanical skills and labour education that is genuinely liberating. We have to do both, of course, but we have to try to maximize the latter kind.

Post-Secondary Official

CHAPTER ONE

Summary of Results from Interviews with Individual Participants

Section 1: Introduction

Six sources of data were identified for the present evaluations:

1. Interviews with senior officials of Labour Canada in Ottawa and in four regional offices.
2. Interviews with executive members and/or education officers of the CLC, the Teamsters and independent labour organizations.
3. Telephone interviews with participants from selected educational events funded by the Labour Education Program.
4. Analyses of records on file with Labour Canada, Ottawa.
5. Independent evaluations of the ARLEC program, of the Labour College, and of the activities at the Labour School at Harrison Hot Springs, B.C.
6. Various media (film, handbooks, videotapes, etc.) produced by recipients of LEP funds.

Interviews with personnel from Labour Canada and from selected labour organizations which had received funds either through contracts or grants were conducted to provide two types of data: (a) information on the programs conducted with LEP funds, on the administration of the programs, the relationships between Labour Canada and those receiving funds, and the relationships among administrative offices in federations, such as the CLC and in the Teamsters, and regional offices from which programs were actually run;

and (b) reactions to the indicators which had been identified as being relevant to anassessment of the success of the LEP (see Appendix F). The results of discussions on the organization and administration of programs appears in Chapter 3 of the present report. The results of reactions to the indicators appear in Chapters 1 and 2 in the form of reports from a large-scale telephone interview survey with participants in every phase of the LEP.

The results of the telephone survey can also be compared to the tabulated results of participant evaluations written at the completion of five LESC (Prairie Region) courses. These results are described in Appendix P.

Table 1-1

Composition of Sample for Questionnaire Data

A. Telephone Sample	No. of Names Provided	Could not Trace	Unable to contact by Dec1/81	Refused	Completed Interviews	Total
Union or Association						
1. Contracts						
Teamsters	45	5	11		29	
CLC*	(123)	(22)	(21)		(89)	
LESC's	70	17	12		41	
ARLEC	32	2	3		27	
Labour College	21	3	6	1	11	
	168	27	32	1	108	108
2. Independents*						
BCGPE	9	1	2		6	
BCHOSP	22	3	5		14	
MONA	20		2		18	
NYLON	12	2	4		6	
NSTCHRS	20		1		19	
NSNURS	20	1	1		18	
CLAC	15	5	1		9	
CAUT	11		1		10	
Police	8		5		3	
	134	12	22	0	103	103
				Sub Total		211

B. Mailed Questionnaires

1. Manitoba Teachers' Society

Number contacted via MTS office = 40	
Completed questionnaires received by Dec.1/81	22
TOTAL	233

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* See Table 1-2 for complete names.

Table 1-2

Abbreviations Used for Tables in Chapters 1 and 2

CLC	Canadian Labour Congress
LESC	Labour Education & Studies Centre
ARLEC	Atlantic Region Labour Eduation Centre
Teamsters	Canadian Conference of Teamsters
BCGPE	British Columbia Government Professional Employees' Association
BCHOSP	Hospital Employees' Union, British Columbia
MONA	Manitoba Organization of Nurses' Associations
NYLON	Kingston Independent Nylon Workers' Union
NSTCHRS	Nova Scotia Teachers' Union
NSNURS	Nova Scotia Nurses' Union
CLAC	Christian Labour Association of Canada
CAUT	Canadian Association of Universty Teachers
Police	Police Association of Ontario
MTS	The Manitoba Teachers' Society
AUCE(BC)	Association of University and College Employees (British Columbia)

Section 2: The Data Collection

Contracts

1. Canadian Labour Congress

The LEP contract with the CLC resulted in funds being distributed to an extremely wide range of activities throughout the country. The CLC elected to set up LESCs. The national centre was responsible largely for the development of instructional programs and learning resources, while the regional centres offered educational courses, workshops and seminars. In addition, funds were assigned to assist in the operation of the ARLEC in Antigonish, and the Labour College in Ottawa. While it would have been possible to only interview senior officers at these locations to gain a sense of the scope of the administration and planning necessary to develop and implement these programs, it was obvious that contact with individuals who had participated in these programs was desirable and presented us with a problem of considerable magnitude. Our approach was to ask administrators and regional directors for the names (20 per region) of participants whom we could contact for individual interviews. We specifically requested that a list of participants be drawn at random from among those who had attended an educational event within the third and fourth years of the LEP. In some cases, the regional offices had some difficulty in providing the telephone numbers or addresses for each person named because many individuals had moved and such additional information had not necessarily been recorded for each event. In the end, we were able to work with a list of 123 names, drawn from the Atlantic, Ontario, Prairies and Pacific Region LESCs, from ARLEC, and from the Labour College.

2. Canadian Conference of Teamsters

The LEP contract with the Canadian Conference of Teamsters resulted in the development of three educational programs: the Western Region administered from Vancouver; the Central Region administered from Toronto; and Eastern Region administered from Montreal and including both Quebec and the Atlantic provinces. We requested and were given the names of 15 participants from each region. All the names provided from the Eastern Region indicated that these participants were all French-speaking. Therefore, we arranged to have these individuals interviewed by French-speaking interviewers who translated the telephone interview into French and then translated the answers back into English. We experienced no difficulty in carrying out this part of the data collection process.

3. Independent Labour Organizations

During the four year period of the LEP, 164 financial grants were made to 81 different labour organizations in four regions. (The frequency with which some organizations received grants in more than one year is to be found in Table 3-11.) We decided that it would be too costly in terms of both time and money to obtain permission from each of these organizations to interview their members and then draw a sample from among both unions and individual participants. As an alternative, we selected a small sample of 11 organizations among which we attempted to balance regions, types and size of organizations, and programs. The organizations selected are shown in the list in Table 1-2.

Each of these independent labour organizations was approached both personally by a member of our research team and via letter (see Appendix K). In all cases except one, the response was positive. Nine organizations provided us with the names of participants who could be contacted by telephone. Table 1-1 shows the organizations and numbers of names made available to us. The Manitoba Teachers' Society decided to cooperate with the evaluation team in any way possible, but would not release the names of individuals and requested that we contact participants through their office. Accordingly, we modified our questionnaire and the Society undertook to distribute it to 40 members who in turn mailed the completed questionnaires back to us. At the time of writing, 30 (75%) had been returned and all but one had the participant's name and return address filled in on the questionnaire. One organization, the Association of University and College Employees (British Columbia) declined to participate in this part of the evaluation. This organization is described as a case study in Chapter 2.

Section 3: The Design of the Questionnaire for the Telephone Interviews

We experimented with telephone interviews in order to determine whether it was possible to collect relevant information on the outcomes of various labour education programs. While telephone interviews have been used with scores of agencies and with many delicate or controversial subjects, we were aware that in order to collect meaningful data the questions asked would have to be quite specific to the event which individuals might have experienced and that it would be impossible to conduct and interview without the full cooperation of the executive of each labour organization which was to be studied. Very few organizations are prepared to release lists of members or participants in educational events without considerable review of the intent of the research and the credibility of the research team.

In these interviews, we asked: (a) what would be the best manner of approaching the individual member in order to secure his/her cooperation to complete a telephone interview; (b) what would be the most appropriate manner for securing permission of the relevant executive to conduct the interviews; (c) would the executive/education officer be prepared to draw a sample of names from participants at recent educational events funded by the LEP; and finally (d) what would be the relevance of asking questions based on the indicators (see Appendix F) which were developed through the interviews conducted in the Preliminary Evaluation.

While some of these questions related more to the mechanics and the politics of gaining access to samples of members who had attended labour education events, answers to the entire set of questions shaped the development of the questionnaire. We decided, for example, to clearly identify the member of the executive or the education officer responsible for providing us with the names for the interview. We decided to interview as many persons as possible from each list and to make no attempt to contact persons not identified in this manner. In other words, no spot checks were conducted. We decided to conduct interviews in either English or French depending on the preference of the member contacted. We procured the services of two fluently bilingual graduate assistants for this purpose and had our final questionnaire translated into French. We accepted the judgment of one independent union not to provide us with a list of names and accepted its offer to mail a written version of the questionnaire to a sample of its members on our behalf.

The final telephone questionnaire (see Appendix I) is the fourth draft. Earlier drafts were tested by interviewing seven members of independent unions, and by discussing the results of these interviews among the research team members. Some of the shortcomings of the final form were still being uncovered during the course of the study (see Chapter 2, Section 1:B). The questionnaire for the mailed study (Appendix J) with the Manitoba Teachers' Society was based as closely as possible on the telephone interview schedule. It was not pretested but the results indicate that there were few difficulties, if any, in its completion.

Section 4: Conduct of the Telephone Survey

The writers and seven graduate students in the Deprtment of Adult Education of OISE served as the interviewers on this study. Two of the students, fluent in French, conducted interviews in that language when the participant preferred this. In most cases our assignment of names to interviewers was done on a unit basis. That is, one interviewer attempted to complete all of the interviews from one particular organization. While this approach has the disadvantage of introducing systematic bias within the data from a particular union, very few lists were actually completed in their entirety by only one person. The vagaries of schedules and the necessity of telephoning across six different time-zones meant that in many cases three different people may have worked on a single list. Table 1-1 indicates the success rate in completing interviews within the time available, which was roughly six weeks from receipt of the final lists and the construction of the final interview schedule to the analysis. In general, the completion rate was excellent. Of 168 potential interviews with Contract participants, we were able to interview 108 (64%); and with the Independent Labour Organizations, we completed 103 of 137 (75%). Of those whom we did not interview, only one refused to be interviewed, 39 (13%) could not be traced even using a combination of city directories and telephone information services, and 54 (18%) could not be reached after repeated attempts. These figures compare very favourably to telephone surveys generally. In fact many market research firms require lists of five names for every interview to be completed. In the present case, it is unlikely that we could have obtained so many names. Some organizations, especially the smaller ones, would simply not have been able to provide many more additional names; and in the case of the larger ones, the amount of work which we required of them in order to produce the present lists very nearly taxed their available time and goodwill.

Section 5: Results for the Total Sample of Telephone Interviews

Table 1-3 presents the aggregate results for all of the Contract interviews (referred to as "Contract" sample) and all of the Independent Labour Organization interviews (referred to as "Independent" sample). Since the results for these two large groupings of respondents will be discussed separately in Chapter 2, the present Section will deal only with the combined TOTAL in each row and percentages based on the total sample of 211 individuals. The interviews with each respondent began by identifying an educational event identified by the labour organization as one in which that respondent had participated. The initial screening questions established the fact that the person being interviewed had indeed attended that event. In only one or two cases was there any difficulty in establishing the respondent's attendance. On such occasions, it was clear that he or she had attended a similar event at about the same time, or had attended the same course but in a different year than was indicated by the organization.

In each of the following questions, please refer to Table 1-3 for tabular material.

Question 4

"Was this the first labour education course in which you were involved?"

Fifty-three percent (53%) of the respondents indicated they had been involved in labour education course(s) in addition to the one identified by their union/association for purposes of this survey.

Question 5

"What other ones did you attend in the past three years?"

Thirty-four percent (34%) of the group indicated that they had attended a conference on labour education but could not specify a particular subject or topic such as the ones shown in the balance of the table for this question. Among these topics, Leadership (12%), Collective Bargaining (11%) and courses related to Shop Steward roles and responsibilities (10%) were mentioned most frequently.

Question 6

"Thinking about the program/course/conference dealing with (particular educational event), how did you select that particular event?"

Thirty-two percent (32%) indicated that they had been invited to go by their union or association executive. Approximately 22% of the group reported that their reasons involved a combination of wanting to further their own education as well as wanting to further their role in their union/association. Fifteen percent (15%) said they attended specifically to further their own education.

Question 4 X Question 6 (Cross Tabulation)

Among those who had never been to a labour education event before, 35% said they attended the present one on the invitation of the union or association executive. Among those for whom this was a further experience with labour education, almost the same percentage (31%) gave this same reason. None of the other possible reasons for attending show a difference of more than 2% when these two groups are treated separately. Note that when both answers which involve the decision to further one's education are combined (codes 6 and 8), the results are 26% for those who had never been to a previous event and exactly the same percentage for those for whom this was not their first event.

It is clear that there is a high degree of personal or intrinsic motivation indicated in the answer "to further own education". Since the various categories are not mutually exclusive and participants might have attended for more than one reason, there is no way of telling to what degree the respondents gave answers which they felt we would like to hear. Indeed, as representatives from an educational institution, we might have attracted answers relevant to further education.

Question 7

"How was your participation in this event funded?"

Sixty-four percent (64%) of the respondents indentified their union or association as providing the funds for their participation. With the exception of 10% of the group (all from the Contract analysis) which identified ARLEC or the CLC as being the source of their support, none of the other categories received many mentions. It is interesting that only 8% indicated that they paid for all or part of their participation themselves.

"How was the event funded?"

Twenty-five percent (25%) identified their association as the source of funds. They indicated either that monies came from educational funds or from dues paid to their association/union. Only 4% actually used the term "Labour Education Program" in describing the source; 11% correctly identified that the Ministry of Labour had partially funded the event, and 18% were aware that the support came from a Federal Grant, but they were unwilling to attempt to identify the appropriate ministry. Note also that 14% were unwilling to entertain any guess as to where the funds came from.

Question 8

". . . listen to each of the following statements and tell me whether each is TRUE for you or FALSE for you or whether you are UNCERTAIN."

In the main most of the statements were endorsed as being TRUE. That is, the respondents thought that they:

a) increased their knowledge about the topic (95%)

b) were made more aware of other unions' problems (81%)

c) had an increased understanding of employees' rights (83%)

e) had more self-confidence (90%)

f) were helped to perform their role in the union (95%)

g) had an increased interest in local union issues (89%)

h) were able to instruct others in the topic (82%)

j) had a chance to form good relationships with other union members (93%)

l) wanted to attend more labour education events (95%)

It is important to note here that, while all of the statements were phrased in a positive manner, there did not appear to be a response set of yea-saying. Participants gave thoughtful answers, frequently elaborating on how they understood the question to apply to themselves. A more rigid design of the study would have alternated positive phrasing with negative phrasing across the various questions, questionnaires and unions, but this approach appeared beyond the scope of the present inquiry. Interviewers did rotate the start point in the list of items to randomize any effects created by the order of the items.

In contrast to these responses, the participants were in less agreement with the following statements; that is, respondents thought that:

d) the event helped their family to appreciate union issues (only 49% said TRUE)

i) what was learned and experienced had an effect on their community (53% said TRUE, 20% were UNCERTAIN)

k) they felt more positive about management's position (68% indicated that this was TRUE, 21% that it was FALSE).

On the whole, it is clear that the more immediate the statement of outcomes, (i.e. knowledge, self-confidence, understanding of rights, interaction with other union members, etc.), the greater the number of participants who endorsed the statement as TRUE. The more remote the statement of outcome (i.e. effect on family and on the community) the fewer the number who endorsed it as TRUE. The remaining item "I feel more positive about management's position as a result of the course" was acknowledged to be TRUE by only 68% of the respondents. This level of agreement must be viewed in relation to the 80-95% endorsements of the other outcome statements. In relative terms, it is considerably lower, In absolute terms, it is significantly better than one might obtain if the question was being answered purely on a random or chance basis. If one trusts the answers, and we have no reason not to, then one of the major objectives of the LEP would appear to have received support from the educational events attended by our respondents. To put this in a more forceful manner: two of three union members interviewed, reported that they felt more positive about management's position as a result of the LEP-funded activities.

Question 8

Open-ended replies to the question: "Are there any general comments you would like to make at this time on this attempt to study the value of trade union education?"

In Chapter 2, we present a detailed analysis of the replies to this question. At this point it is sufficient to note that replies were split into two categories, depending upon the interpretation of the question. Forty-three percent (43%) of respondents made a comment about the value of the evaluation per se and of these nearly all commented positively about it. Forty-one percent (41%) commented on the value of labour education, rather than on the evaluation process, and of these nearly all were positive.

Question 9

"Did you feel any differently about your job after this program?"

Responses to this question were split. Overall, nearly half (48%) of those interviewed replied "Yes" to this question. Detailed replies to the follow-up query "In what way?" are given in Chapter 2.

Question 10

"Did your position in your union (or association) change in any way as a result of this event?"

Only 39% of the replies were positive in the sense that the respondents had perceived a change as a result of the event. However, within the "No" category there were many comments indicating that, since the respondent was already president of his/her local or already as heavily involved in labour affairs as was possible given other commitments, no additional change could be expected. A number of specific changes were noted with the "Yes" category, and these are described in Chapter 2. In the following list we present a completely random sample of 10 such changes drawn from those who replied "Yes" to this item: five from the Contract sample and five from the Independent sample of respondents.

From the Contract sample:

1. Yes. . . a great deal. I refuse to be put down. I'm becoming an influence in my local.
2. Sparked more interest in what I wanted to achieve in labour studies.
3. Asked to take on more responsibility.
4. Union people are like politicians. Through the Labour College you're better able to communicate with people, you become more respected as a local union leader. You have the feeling that after the program people feel you're in the know. People come to me more. They accept that I've matured.
5. I do a better job. I can answer questions better.

From the Independent sample:

1. More opinions were apparent. I understood differences in people.
2. I now chair the grievance committee.
3. I became a negotiator.
4. I advanced in the union.
5. I went from chief steward to steward. I had been steward for five or six years. It hurt. (No further explanation given.)

Clearly not all of the outcomes were positive. Yet, these comments, in their simplicity and variation summarize all of the different types of outcomes that people attributed to their attendance at the various LEP-supported activities.

Question 11

"What other labour education activities are carried out by your local (or chapter)?"

Not surprisingly, only 42% of respondents from the independent labour organizations were able to name "other" activities. In many cases, the educational event which they had attended, and which led to their being named for this study, was perceived as the only or first activity conducted by a particular organization or local. In contrast, 72% of those coming from the Contract sample were aware of other educational programs being supported by their labour organization or federation. Training for shop stewards was mentioned most frequently by those within the Contract sample, followed frequently by mentions of workshops and seminars in grievance and arbitration, and then by courses in occupational health and safety.

Within the Independent sample, grievance and arbitration headed the list of "other" educational activities. Our impression was that in many cases it was difficult for some respondents to clearly identify what events fell into the category of "labour education activities", and what events constituted professional development or business activities. For some, the preparation and dissemination of a monthly newsletter constituted a form of labour education; while for others, the preparation of up-dated statements of retirement benefits fell into the same category. A more accurate picture of what was offered within the total LEP is shown in the tables and figures in Chapter 3.

Question 12

"Is the program relevant to what you want to know?"

Seventy-two percent (72%) of the Contract sample replied that they were aware of the educational program of their union (local), and nearly all of these replied that the program was relevant to their learning needs.

Replies from the Independent sample are somewhat obscure. Whereas only 42% of the total sample could describe the program of their local (association), 59% of the total sample said that what was being done was relevant. (We have no immediate suggestion as to the meaning of this discrepancy; it may be a case of: I don't know what they're doing, but whatever it is, it's O.K.)

Question 13

"Do you recall any tapes, films, or print material that were used as part of the program?"

Many of the programs described by both Contract and Independent Labour Organizations indicated that they involved the production of pamphlets, booklets, tapes, films, and so on. Therefore, we asked this question to obtain some idea not only of the frequency with which various types of media were used at particular events, but also of the impact which these media made on participants.

An assessment of the rate of use was fairly straightforward. Overall, printed resources were mentioned by 71% of respondents (45% mentioned print alone, 26% mentioned print in combination with other media). Films were mentioned both alone and in combination with other media by 34% of the respondents. Tapes (video and/or audio) were mentioned both alone and in combination with other media by 13% of respondents. It is also noteworthy that in 13% of the cases no media was cited. In many of these cases, the actual educational event was a seminar or discussion group in which dialogue or simulation was employed.

An assessment of the impact was carried out in terms of the follow-up questions:

"Do you recall the name of the material?"

"Can you say how it has been useful?"

"Can you say why it has not been useful?"

These questions produced such a mixed set of responses that it was almost impossible to summarize them. In the majority of cases, individuals were able to recall the title of films or videotapes which they had seen; and almost all commented either that the presentation enhanced the message of the particular workshop or presentation, or that they were able to recall the examples used in these media when they were back on the job or engaged in labour-related activities. Print materials covered such diverse topics as labour codes, sample contracts, shop steward manuals, parliamentary procedures, occupational health and safety standards, and job appraisal techniques. Most respondents commented that they had taken the materials home with them and had continued to use the materials as a reference resource. In the main, the media used were viewed as relevant, and the content was thought to be transferable to the individual's job situation. Because of the multiplier effect of producing educational media--that is, it can be used many times not only by the original recipient but also by others to whom it may be given, and it can be disseminated widely and for a long time after it has been produced--we have devoted considerable effort to evaluating a selection of the media produced within the LEP-funded programs. This evaluation appears in Chapter 5.

Question 14

"We are interested in contacting others with whom you have worked since the conference/workshop who might have noticed any differences in how you approached union or labour problems. Do you think there are any of your colleagues that we could talk to about this, and could you give us the names of two or three that you think might be willing to talk to us in an interview sometime in the next week or so?"

Thirty percent (30%) of the total sample were unable to provide any names. This percentage was almost identical for both the Contract and Independent samples. Of the remaining 70%, over half provided at least two names and the others provided one name. Very rarely was there any objection to this question. In fact, many respondents went to considerable pains to obtain current telephone numbers for these colleagues. Among the 30% who could not or would not provide names, many commented that they could not think of anybody who could provide the type of assessment for which we were asking; that is, someone who might have noticed any differences in how you have approached union or labour problems.

Some noted that since the event in question, they had dropped out of active involvement in the union, others pointed out that there had been no negotiations since the event and that any changes therefore would not have been observed; and still others had changed locale or jobs within their original place of employment. In all, we feel that the participants in the LEP events were confident that they did have colleagues who could and probably would be able to comment on changes in their behavior which might reasonably be attributed to the educational program.

Question 15

"Does the respondent want a summary of the findings of this evaluation and will he or she provide us with an address to which it can be mailed?"

An overwhelming 87% replied that they were interested in receiving a copy of our results and each provided a mailing address to which it might be sent. In rare cases, the respondent asked that it be forwarded through his or her union office or through the contact person who had provided us with the names for the interviews. In two cases, the comment was, "Send two.".

Section 6: Summary Comments on the Total Sample

The statistics which we have presented indicate that the LEP has supported educational activities which were highly valued by almost everyone whom we interviewed. The respondents indicated that their experience was positive, that the outcomes were desirable, and that education is viewed as an important contribution to labour in general and to themselves in particular. A theme we heard repeatedly was that the major outcome for those in our sample was an increase in their self-confidence. They spoke about improved ability to communicate, increased awareness of interpersonal and group problems, and changes in their attitudes towards management. Among those who had been to previous educational events, 90% wanted to participate in further training, and among those for whom this was their first program, 96% expressed a desire for more courses or workshops.

The telephone interviews come from a sample of 211 workers: male and female, English-speaking and French-speaking, rural and urban, from every province, and from nearly 40 different unions. It is impossible to write a single bottom line to this type of survey. If there is one, then it consists of a pair of quotations. The first comes from a participant in British Columbia who said, "I think it makes for better employer-employee relations. I have a better insight--I see the other side of the picture and know that the collective agreement is mutual but has different interpretations. I wish that simple language was used." The second comes from a graduate of the Atlantic Region Labour Education Centre who said, "It's the greatest thing we have ever had. We're naive about so many things not taught in the public school system. Many things come as a shock."

Table 1-3

Summary of All Telephone Interviews

	Cont-racts (n=108) Number	Indep-end-ents (n=103) Number	Total (n=211) Number	%
Q. #4. Was that the first labour education course in which you were involved?				
1 Yes	41	53	94	45%
2 No	64	48	112	53
3 No Answer	3	2	5	2
Total				100%
Q. #5. What other ones did you attend in the last three years?				
1 Labour relations	1	8	9	8%
2 Shop steward	7	5	12	10
3 Labour code/law/economics	5	2	7	6
4 Occ. health & safety	6	2	8	7
5 Collct. agrmt./bargaining	4	9	13	11
6 Leadership/instructor training	4	10	14	12
7 Arbitration/grievances	6	4	10	9
8 Courses > 3 years ago	8	1	9	8
9 Parliamentary procedure				
0 Topic unspecified or "other"	27	8	35	30%
Total	68	49	117	100%
Q. #4 vs. Q # 5.				
If answer "Yes" to Q. #4 (i.e., this was the first labour education course in which you were involved), what other course did you attend since then?				
1 Labour relations	3	1	4	
2 Shop Steward	1		1	
3 Labour code/law/economics				
4 Occ. health & safety				
5 Collct. agrmt./bargaining		5	5	
6 Leadership/instructor training		1	1	
7 Arbitration/grievances				
8 Courses > 3 years ago				
9 Parliamentary procedure				
0 Topic unspecified or "other"				
Total replying "Yes"	(41)	(53)	(94)	

	Contracts (n=108) Number	Independents (n=103) Number	Total (n=211) Number	%
If answer "No" to Q. #4 (i.e., this was not first labour education course), what other courses did you attend in the last three years?				
1 Labour relations	1	8	9	8%
2 Shop steward	7	5	12	11
3 Labour code/law/economics	4	2	6	5
4 Occ. health & safety	6	2	8	7
5 Collct. agrmt./bargaining	4	4	8	7
6 Leadership/instructor training	9	9	18	16
7 Arbitration/grievances	1	4	5	4
8 Courses > 3 years ago	8	1	9	8
9 Parliamentary procedure	3	6	9	8
0 Topic unspecified or "other"	21	7	28	25
Total replying "No"	(64)	(48)	(112)	(89)
Q. #6. Thinking about the program/course/conference: How did you select it?				
1 Supervisor suggested I go	2	0	2	1%
2 Went with friend ("outing")	9(a)	2	11	5
3 Read about it in union pub.	9	4	13	6
4 Nominated by co-workers	8	4	12	6
5 Invited by executive	39	29	68	32
6 To further my education	12(b)	19	31	15
7 To further my role in union	12	6	18	9
8 Code 6 + another reason	11	13	24	12
9 Code 7 + another reason		4	4	2
0 Code 6 + Code 7	6	22	28	13
Total	108	103	211	100

	Cont-racts (n=108) Number	Indep-end-ents (n=103) Number	Total (n=211) Number	%
Q. #4 vs. Q. #6				
If this is your first labour education event, how did you select it?				
1 Supervisor suggested I go	1		1	1%
2 Went with friend ("outing")	6(a)	1	7	8
3 Read about it in union pub.	3	4	7	8
4 Nominated by co-workers	2	2	4	4
5 Invited by executive	19	13	32	35
6 To further my education	4(b)	10	14	15
7 To further my role in union	5	3	7	8
8 Code 6 + another reason	1	9	10	11
9 Code 7 + another reason		3	3	2
0 Code 6 + Code 7		7	7	8
Total replying "Yes"	(41)	(52)		
If this is not your first labour education event, how did you select it?				
1 Supervisor suggested I go	1		1	1%
2 Went with friend ("outing")	3(a)	9	12	1
3 Read about it in union pub.	6		6	6
4 Nominated by co-workers	5	2	7	6
5 Invited by executive	19	14	33	31
6 To further my education	7(b)	7	14	13
7 To further my role in union	6	3	9	8
8 Code 6 + another reason	10	4	14	13
9 Code 7 + another reason		2	2	2
0 Code 6 + Code 7	4	6	10	9
Total replying "No"	(61)	(47)		

	Contracts (n=108) Number	Independents (n=103) Number	Total (n=211) Number	%
Q. #7a. How was your participation in this event funded?				
0 No answer	3	2	5	2%
1 Paid for it myself	6	2	8	4
2 Paid for part myself	5	4	9	4
. . . the rest of the costs?				
3 "Scholarship"--Labour College	5		5	2
4 Union or association	55	81	136	64
5 Company		2	2	1
6 Provincial government	3	1	4	2
7 "Government"	7	4	11	5
8 CLC	22(d)		22	10
9 Did not wish to say	2	7	9	4
Total	108	103	211	100%
Q. #7b. How was the event funded?				
1 Teamsters/CLC(e)	29		29	14%
2 DREE or Int'l. Teamsters(e)	4		4	2
3 Provincial government	6	11	17	8
4 Union (unspecified)	2	4	6	3
5 Other	2	1	3	1
6 Association dues	14	38	52	25
7 "Labour Ed. Program"	3	6	9	4
8 Ministry of Labour	13	9	22	11
9 Federal grant	22	15	37	18
0 Doesn't know; won't guess	13	16	29	14
Total	108	100	208(f)	100%

Q. #8.(c)

		Contracts (n=108) Number	Independents (n=103) Number	Total (n=211) Number	%
a Increased knowledge about topic	T	99	101	200	95%
	F	4	2	6	3
	?	5		5	2
b More aware of other unions' problems	T	92	78	170	81
	F	11	19	30	14
	?	5	5	10	5
c Increased understanding of employees' rights	T	89	87	176	83
	F	8	9	17	8
	?	9	7	16	9
d Helped family to appreciate union issues	T	58	43	101	49
	F	37	42	79	38
	?	11	17	28	13
e Increased self-confidence	T	98	91	189	90
	F	4	5	9	4
	?	4	7	11	5
f Help to perform role in own union	T	101	100	201	95
	F	3	2	5	3
	?	2	1	3	2
g Increased interest in local union issues	T	90	94	184	89
	F	13	7	20	10
	?		2	2	1
h Able to instruct others in topic	T	81	88	169	82%
	F	13	10	23	11
	?	11	4	15	7
i What was learned and experienced had effect on community	T	63	47	110	53
	F	25	33	58	28
	?	18	23	41	20
j Chance to form good relationships with other union members	T	101	92	193	93
	F	4	9	13	6
	?		2	2	1
k Feel more positive about management's position	T	70	73	143	68
	F	24	19	43	21
	?	12	11	23	11
l Want to attend more labour education events	T	98	100	198	95
	F	1	1	2	1
	?	7	2	9	4

	Contracts (n=108) Number	Independents (n=103) Number	Total (n=211) Number	%
Do you have any comments on this evaluation?				
Yes	101	94	195	93%
No	5	9	14	7
If "Yes":				
Positive re. evaluation	48	40	88	43%
Negative re. evaluation	3	3	6	3
Positive re. lab. ed. program	36	45	81	39
Negative re. lab. ed. program	3	2	5	2
Neutral comment	14	13	27	13
Q. #4 vs. Q. #8(1)				
If this is your first labour education event, do you want to attend more labour education events?				
Yes	37	48	85	90%
No	2	3	5	5
Not sure	2	2	4	4
Total	41	53	94	
If this is not your first labour education event, do you want to attend more?				
Yes	60	48	108	96%
No	2	1	3	3
Not sure	2		2	2
Total	64	49	113	
Q. #9. Do you feel any differently about your job after this program?				
Yes	54	45	99	48%
No	51	58	109	52

	Contracts (n=108) Number	Independents (n=103) Number	Total (n=211) Number	%
Q. #10. Did your position in your union change in any way as a result of this event?				
Yes	43	39	82	39%
No	63	64	127	61
Q. #11. Other labour education activities carried out by your local (chapter).				
Yes	72	42	114	57%
None named	28	58	86	43
Q. #12. Is the program relevant to what you want to know?				
Yes	68	59	167	97%
No	4	2	6	3
Q. #13. Do you recall any (media) that was used as part of the program?				
None used	17	10	27	13%
Tapes	5	4	9	4
Films	12	10	22	10
Print	38	56	94	45
Tapes and film	3		3	1
Film and print	24	16	40	19
Tapes and print	4	6	10	5
All three	5	1	6	3

	Cont- racts (n=108) Number	Indep- end- ents (n=103) Number	Total (n=211) Number	%
Q. #14. Number of associates named for future contact.				
0	32	31	63	30%
1	28	25	53	25
2	36	41	77	37
3	10	6	16	8
Do you wish a summary report of your evaluation?				
Yes	90	93	183	87%
No	2	10	12	6
N/A	16		16	8
Total	108	103	211	

(a) Code 2 for ARLEC = "Friend suggested I go" (see Table 2-3).

(b) Code 6 for Labour College = Instructor Training (see Table 2-3).

(c) Question 8 read: In some of our other studies of labour education, members have mentioned a large number of things that might have been affected through their attendance and participation in various events. Thinking specifically about the event we have been discussion, would you listen to each of the following statements and tell me whether each is TRUE for you or FALSE for you, or whether you are UNCERTAIN.

(d) Code 8 for ARLEC with ARLEC respondents (see Table 2-1).

(e) See Table 2-1.

(f) If totals in column do not add up to "n", then some respondents gave no reply and/or some gave more than one reply.

CHAPTER TWO

The Major Samples:

The Independent Labour Organizations and the Contracts

Section 1: The Independent Labour Organizations

The analyses of the data from the independent labour organizations are presented in several sub-sections: A. A Quantitative Analysis; B. A Qualitative Analysis with an Analysis of Selected Labour Organizations; C. A Summary of Replies to the Mailed Questionnaire; and, D. Brief Case Studies.

A. A Quantitative Analysis

Table 2-1 presents the raw frequencies from the questionnaires completed for each union in the sample referred to as the Independent sample. We have not converted these figures to percentages except in the case of the totals shown at the left of each row of the table (nearest the answer categories). This has been deliberate. When comparisons of percentages are made between groups of approximately equal size (e.g. Manitoba Organization of Nurses' Associations and the Nova Scotia Teachers' Union), then there is a common base-line and the margins of error in the percentages might be roughly equivalent. However, when percentages are based on as few as three respondents (Police Association of Ontario), then comparisons with other larger groups can easily lead to erroneous conclusions. The data being presented in Table 2-1 show the basis on which the percentages for the entire sample of independent labour organizations were derived. We have not attempted to evaluate the individual organizations which constitute this sample. Rather, our intent is to present figures which relate to one of the major components of the LEP--the distribution of funds through grants to independent labour organizations. In Section 2 of this chapter, we present an analysis of data on the other major component of the LEP--the distribution of funds through contracts to the Canadian Labour Congress and the Canadian Conference of Teamsters.

Our commentary on the questions themselves and on the general responses made by the Independent sample are made in Chapter 1, Section 5. We should note here that for the True/False items (Question 8) the responses of the Manitoba Teachers' Society (who were surveyed by mail) have been added to Table 2-1. This permits a rough comparison between the mailed responses and those obtained through telephone interviews. As well, the reader may wish to compare the Manitoba Teachers' Society responses with those of the Nova Scotia Teachers' Union. These two sub-samples are of roughly the same size (22 and 19 respectively) and represent the membership of similar organizations, although the possible effects of responding to the questions in written, rather than oral form should be kept in mind. Such comparisons are also useful in assessing the reliability of the questionnaire. If noticeable differences can be explained (some would say rationalized), then more credibility can be attached to the whole sampling and interviewing technique employed in this evaluation.

Our analysis shows that, within Question 8, items (b), (d), (e), and (k) show different patterns of responses between the mailed and telephone surveys (see also Table 2-3). Differences in item (b) are not surprising since the topic of the Manitoba Teachers' Society program was specifically directed toward the study of issues in other provinces. Differences in item (d) might be explained by the observation that the participants in the Manitoba Teachers' Society were all senior association members who might already have developed a high level of self-confidence. Item (k), which refers to "management's position", might not be an appropriate indicator for the Manitoba Teachers' Society program because it dealt with alternative bargaining strategies and with comparisons of contracts from different provinces.

In all other respects, it would appear that the questionnaire does have a good degree of validity and that it is sensitive to the effects of different educational programs within different independent labour organizations.

Table 2-1

Summary of Interviews from Independent Labour Organizations

	All (n=103)	BCHOSP (n=14)	BCGPE (n=6)	MONA (n=18)	NSNURS (n=18)	NSTCHR (n=19)	CLAC (n=9)	CAUT (n=10)	Police (n=3)	NYLON (N=6)	MANTCH
Q. #4. Was that the first labour education course in which you were involved?											
1 Yes	53	5	3	11	12	8	4	9		1	
2 No	48	9	2	7	6	11	4	1	3	5	
3 No Answer	2		1				1				
Q. #5. What other ones did you attend in the last three years?											
1 Labour relations	8	1	3		3	1			1		
2 Shop steward	5	3					2				
3 Labour code/law/ economics	2	1				1					
4 Occ. health & safety	2									2	
5 Collct. agrmt./bargaining	9			2	1		1	2	2	1	
6 Leadership/instructor training	10					10					
7 Arbitration/grievances	4			2	1					1	
8 Courses > 3 years ago	1							1			
9 Parliamentary procedure											
0 Topic unspecified or "other"	8	2			1		2	1		2	
Q. #4 vs. Q # 5.											
If answer "Yes" to Q. #4 (i.e., this was the first labour education course in which you were involved), what other courses did you attend since then?											
1 Labour relations											
2 Shop steward											
3 Labour code/law/economics											
4 Occ. health & safety											
5 Collct. agrmt./bargaining	5			1			1	2		1	
6 Leadership/instructor training	1					1					
7 Arbitraation/grievances											
8 Courses > 3 years ago											
9 Parliamentary procadure											
0 Topic unspecified or "other"	1							2			

	All (n=103)	BCHOSP (n=14)	BCGPE (n=6)	MONA (n=18)	NSNURS (n=18)	NSTCHR (n=19)	CLAC (n=9)	CAUT (n=10)	Police (n=3)	NYLON (N=6)	MANTCH
If answer "No" to Q. #4 (i.e., this was not first labour education course), what other courses did you attend in the last three years?											
1 Labour relations	8	1	2		3	1			1		
2 Shop steward	5	3					2				
3 Labour code/law/economics	2	1				1					
4 Occ. health & safety	2									2	
5 Collct. agrmt./bargaining	4			1	1				2		
6 Leadership/instructor training	9					9					
7 Arbitration/grievances	4			2	1					1	
8 Courses > 3 years ago	1							1			
9 Parliamentary procedure	7	2	1	4							
0 Topic unspecified or "other"	7	2			1		2			2	
Q. #6. Thinking about the program/course/conference: How did you select it?											
1 Supervisor suggested I go											
2 Went with friend ("outing")	2			1						1	
3 Read about it in union pub.	4				2			2			
4 Nominated by co-workers	4	2		2							
5 Invited by executive	29	1	2			19		6	1		
6 To further my education	19	8	2	1	4			2		2	
7 To further my role in union	6		1	2						3	
8 Code 6 + another reason	13			6	4		2		1		
9 Code 7 + another reason	4		1				2		1		
0 Code 6 + Code 7	22	3		6	8		5				
Q. #4 vs. Q. #6 If this is your first labour education event, how did you select it?											
1 Supervisor suggested I go											
2 Went with friend ("outing")	1			1							
3 Read about it in union pub.	4			2			2				
4 Nominated by co-workers	2	1		1							
5 Invited by executive	13	1	1			8		5			
6 To further my education	10	3	1		4			2			
7 To further my role in union	3		1	1						1	
8 Code 6 + another reason	9			5	3	1					
9 Code 7 + another reason	3		1				2				
0 Code 6 + Code 7	7			3	3		1				

	All (n=103)	BCHOSP (n=14)	BCGPE (n=6)	MONA (n=18)	NSNURS (n=18)	NSTCHR (n=19)	CLAC (n=9)	CAUT (n=10)	Police (n=3)	NYLON (N=6)	MANTCH
If this is not your first labour education event, how did you select it?											
1 Supervisor suggested I go											
2 Went with friend ("outing")	9				5		3			1	
3 Read about it in union pub.											
4 Nominated by co-workers	2	1		1							
5 Invited by executive	14		1			11		1	1		
6 To further my education	7	3	1	3						2	
7 To further my role in union	3			1						2	
8 Code 6 + another reason	4			1	1		1		1		
9 Code 7 + another reason	2		1						1		
0 Code 6 + Code 7	6	3		3							
Q. #7a. How was your participation in this event funded?											
0 No answer	2			1			1				
1 Paid for it myself	2									2	
2 Paid for part myself	4	1					1	1	1		
. . . the rest of the costs?											
3 "Scholarship"--Labour College											
4 Union or association	81	12		14	17	19	5	9	1	4	
5 Company	2		1				1				
6 Provincial government	1				1						
7 "Government"	4	1		3							
8 CLC											
9 Did not wish to say	7		5				1		1		
Q. #7b. How was the event funded?											
1 Teamsters/CLC											
2 DREE or Int'l. Teamsters											
3 Provincial government	11			2	7					2	
4 Union (unspecified)	4		1		3						
5 Other	1	1									
6 Association dues	39	4		6	1	14	4	8		1	
7 "Labour Ed. Program"	6			4					2		
8 Ministry of Labour	9	1	2	4	1					1	
9 Federal grant	15	8	2	1		1	1			2	
0 Doesn't know; won't guess	16		1	1	3	4	4	2	1		

Q. #8*.

		All (n=103)	BCHOSP (n=14)	BCGPE (n=6)	MONA (n=18)	NSNURS (n=18)	NSTCHR (n=19)	CLAC (n=9)	CAUT (n=10)	Police (n=3)	NYLON (N=6)	MANTCH
a Increased knowledge about topic	T	101	14	6	18	16	19	9	10	3	6	22
	F	2				2						
	?											
b More aware of other unions' problems	T	78	9	3	17	17	9	6	9	3	5	22
	F	19	4	2	1	1	7	3	1			
	?	5	1	1			3					
c Increased understanding of employees' rights	T	87	13	6	18	16	14	6	6	2	6	16
	F	9				2	3	1	3			3
	?	7	1				2	2	1	1		3
d Helped family to appreciate union issues	T	43	6	1	8	6	12	4	3	1	2	4
	F	42	3	4	6	11	4	5	5	1	3	10
	?	17	5	1	4	1	3		2	1		8
e Increased self-confidence	T	91	13	5	18	15	18	7	7	3	5	10
	F	5	1	1		1		1			1	6
	?	7				2	1	1	3			6
f Help to perform role in own union	T	100	14	5	18	16	19	9	10	3	6	21
	F	2				2						
	?	1		1								1
g Increased interest in local union issues	T	94	14	6	17	18	16	8	7	2	6	19
	F	7			1		3	1	2			3
	?	2							1	1		
h Able to instruct others in topic	T	88	13	3	18	16	16	4	10	3	5	17
	F	10		3			1	5			1	
	?	4	1			2	1					5
i What was learned and experienced had effect on community	T	47	8	1	8	10	6	1	2	2	3	4
	F	39	4	5	7	8	6	4	4	1		7
	?	23	2		3		7	4	4		3	11
j Chance to form good relationships with other union members	T	92	13	3	18	18	19	4	9	3	5	19
	F	9		3				5			1	
	?	2	1						1			3
k Feel more positive about management's position	T	73	11	4	15	13	15	6	3	3	3	6
	F	19	3	2	2	4	1	2	3		2	8
	?	11			1	1	3	1	4		1	7
l Want to attend more labour education events	T	100	14	5	1	18	19	9	8	3	6	20
	F	1		1								
	?	2							2			2

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* See Table 1-3, footnote (C), for complete question.

	All (n=103)	BCHOSP (n=14)	BCGPE (n=6)	MONA (n=18)	NSNURS (n=18)	NSTCHR (n=19)	CLAC (n=9)	CAUT (n=10)	Police (n=3)	NYLON (N=6)	MANTCH
Do you have any comments on this evaluation?											
Yes	94	14	6	16	17	19	3	10	3	6	
No	9			2	1		6				
If "Yes":											
Positive re. evaluation	40	8	3	6	8	2	1	6	1	5	
Negative re. evaluation	3				1				1	1	
Positive re. lab. ed. program	45	8	1	8	7	17	2	1	1		
Negative re. lab. ed. program	2		2								
Neutral comment	13			4			6	2	1		
Q. #4 vs. Q. #8(1).											
If this is your first labour education event, do you want to attend more labour education events?											
Yes	48	5	2	11	12	8	4	7		1	
No	3		1					2			
If this is not your first labour education event, do you want to attend more?											
Yes	48	9	2	7	6	11	4	1	3	5	
No	1									1	
Q. #9. Do you feel any differently about your job after this program?											
Yes	45	7	3	14	5	8	3	2	1	2	
No	58	7	3	4	13	11	6	8	2	4	
Q. #10. Did you position in your union change in any way as a result of this event?											
Yes	39	4	3	7	7	1	5	5	1	6	
No	64	10	3	11	11	18	4	5	2		

	All (n=103)	BCHOSP (n=14)	BCGPE (n=6)	MONA (n=18)	NSNURS (n=18)	NSTCHR (n=19)	CLAC (n=9)	CAUT (n=10)	Police (n=3)	NYLON (N=6)	MANTCH
Q. #11. Other labour education activities carried out by your local (chapter)?											
Yes	42	4	2	1	12	9	2	4	2	6	
None named	58	10	4	14	6	10	7	6	1		
N/A	3			3							
Q. #12. Is the program relevant to what you want to know?											
Yes	59	3	1	14	12	17		4	2	6	
No	2						2				
N/A	42	11	5	4	6	2	7	6	1		
Q. #13. Do you recall any (media) that was used as part of the program?											
None used	10	1	1	2	1		4			1	
Tapes											
Films											
Print	4		1	3							
Tapes	10		2	7	1						
Films and print	56	13	2	3	5	18	4	3	3	5	
Tapes and print	16			3	10	1	1	1			
All three	6							6			
Q. #14. Number of associates named for future contact.											
0	31	2	1	4	5	3	9	1		6	
1	25	3		2	11	6		2	1		
2	41	6	4	11	2	9		7	2		
3	6	3	1	1		1					
Do you wish a summary report of your evaluation?											
Yes	93	14	6	18	18	19		10	3	5	
No	10						9			1	

B. A Qualitative Analysis with an Analysis of Selected Labour Organizations

The usual method of assessing qualitative data--the replies given to the open-ended questions--is to develop categories for each question and then count the frequency with which each of these categories is used by a given group of respondents. We began our analysis in this way by selecting two sets of responses, the Nova Scotia Teachers' Association and the B.C. Hospital Employees' Union. It became apparent very early in this process that: (a) each organization would generate many unique categories, depending on the particular educational event which its members had attended; (b) there were some categories common to all groups of respondents; and (c) some of the groups (e.g. the three respondents from the Police Association of Ontario) were going to be too small to permit the development of categories.

Our solution to this problem has involved the following:

1. we completed our initial screening of the two groups named above and the results of this analysis are presented in sub-section B:1;
2. we have drawn a random sample of questionnaires from the independent labour organizations questionnaires (see Table 2-2) and have presented the open-ended material from these in a non-statistical manner in sub-section B:2; and
3. where appropriate, we have drawn comparisons between the random sample results B:2 and the material in sub-section B:1.

TABLE 2-2

Composition of the Random Sample

Name of Association/Union	Number of Interviews	Number in Sample
Police Association	3	1
Nylon Workers	6	1
B.C. Government Professional Employees	6	2
Christian Labour Association	9	3
Canadian Association of University Teachers	10	3
Nova Scotia Nurses' Society	18	6
Manitoba Organization of Nurses' Association	18	6
Totals	70	23 (33%)

In addition to the data derived from these 23 respondents there is an additional set which is presented in sub-section D based on responses from members of the Manitoba Teachers' Society. (In sub-section D we note that there are very few differences in tone or content between replies derived from a mailed version of the questionnaire, and replies obtained via telephone interviews.)

B:1. Summary of Open-ended Questions from Two Selected Unions

B.C. Hospital Employees' Union

Question 8

General comments about this attempt to study the value of trade union education.

Number of respondents: 12

Central tendency: Courses very beneficial. It is good to be better informed.

Example 1: I think it makes for better employer-employee relations. A better insight--see other side of picture. Know that collective agreement is mutual, but different interpretations. Wish that simple language was used.

Example 2: I suppose education is always good. Always fearful of spending money to write articles to go into a file and achieve nothing. I want to feel that the study will be beneficial.

Example 3: Why can't the courses come to us? Why do we have to go outside our community for them? Will this survey encourage greater union education activity?

Question 9

Did you feel any differently about your job after this program?

Number of respondents: 6

Central tendency: Gained in knowledge and self-confidence.

Example: Whole attitude has shifted positively. I now know my rights and I feel better able to handle various job situations. More self-confidence.

Dissatisfied person example: More dissatisfied--I now know what we're not getting and what the real problems are.

Question 10

Did your position in your union/association change in any way as a result of this event?

Number of respondents: 3

Central tendency: Got promoted in union. More people asked me questions.

Example: Went from Shop Steward to Grievance Officer. (More power.)

Question 11

What other labour education activities are carried out by your local (or chapter)?

Number of respondents: 4

Assorted answers: monthly meeting to discuss the contract; on safety; courses on women in unions offered not by the local but by a nearby college.

Can you give me an example?

Central tendency: Various Government Acts (e.g. Human Rights, Labour Code), pamphlets, contracts and agreements.

Examples: Collective agreement. Canada Standards Act. Human Rights Act. Parliamentary Procedure.

Nova Scotia Teachers Union

Question 8

General comments about this attempt to study the value of trade union education.

Number of respondents: 19

Central tendency: Was very informative, both for those attending for the first time as well as those there for the third time. Information on duties of union officers and running meetings helpful. Very helpful in meeting others from all over the province. Timing good.

Example 1: Excellent opportunity to get to meet colleagues and discuss issues, meet people you have to deal with face-to-face. Builds up confidence. Helps make right contacts.

Example 2: Great value for beginning officers of unions. Gives insight into your responsibilities as a union officer.

Question 9

Did you feel any differently about your job after this program?

Number of respondents: 8 (out of 19)

Central tendency: Gained in confidence. Feel job is more important.

Example: Felt a little more confident of ability to handle job.

Question 10

Did your position in your union/association change in any way as a result of this event?

Number of respondents: only 1 (out of 19). All others indicated "No".
That one response was: Expects to become President next year.

Question 11

What other labour education activities are carried by your local (or chapter)?

Number of respondents: 9 (out of 19). All others indicated "None".

Central tendency: In-service training. Also helpful in "Schools Today" program during Education Week: raising public awareness.

B:2. The Random Sample

Question 8

At the mid-point of question 8 we asked, "Are there any general comments you would like to make at this time about this attempt to study the value of trade union education?" It became apparent as the interviewing progressed that the wording of this question was quite inadequate. While we had intended it to be an opportunity for respondents to comment on the evaluation *per se*, it became clear that many of them (and as it turned out several of our interviewers) interpreted the question as an opportunity to comment on the labour education program in which they had been involved. Since the frequency of these two interpretations appeared to be about equal, we encouraged our interviewers to focus on reactions to the evaluation but to be open to comments about labour education programs if these were made. In our random sample, the results of this ambiguity in the question are quite clear, both sets of responses were almost unanimously positive. Twenty of the respondents (87%) chose to make some comment.

Comments of the evaluation being carried out:

Positive:

1. Good idea to evaluate the program.
2. Probably as good as any other approach.
3. People who give the money should know what's going on. It's been going on for some time now and it's time to evaluate it.
4. It's a good idea but difficult to recall things in detail.
5. I think you're asking the right sort of questions.
6. Anything that helps (the programs) to continue is useful.
7. (Questions) sound like post-workshop evaluation. To the extent that they are valid then this (evaluation) is probably valid.
8. The government has to keep an eye on funding and I think it's a good thing. I would like to know where the funding goes. The telephone interview is fine. Better than personal interview because then you lose confidentiality.

Negative:

1. I'm quite reluctant to answer your questions. You could be anybody. You could be with the government or with the company.

Comments on the labour education program or on labour education generally:

All comments positive (13 of 20 respondents):

1. Labour education grants we've been getting are great and make us viable. We couldn't get along without the funding and hope it continues.
2. More trade education needed.

3. I feel employee/employer relations would benefit.

4. I'm able to know what's going on--presents the issues.

5. There's been too much brawn and not enough brains in labour--time for a more educated view.

6. Any union or club has trouble with participation. Knowledge helps hold people together; problems of labour are made understandable.

7. Really enjoyed my three days. Found it very educational . . . speakers from Department of Labour. Plenty of practice.

8. Had a positive experience. Would want more people involved.

9. There should be more labour programs available to generate knowledge about union activities. (Plus 5 additional responses which support this view.)

We would like to note that the overwhelming tone of the interviews was positive. Even those who were caught at busy times of the day or evening welcomed an opportunity to talk about their experiences. While a very few were reluctant to provide elaborations of their answers beyond simple "Yes" or "No", the majority of those contacted entered into animated conversations with our interviewers.

Question 9

In response to question 9, "Did you feel any differently about your job after this program?", nine persons replied "Yes". Our intention in asking the question had been to have the respondent focus on his/her day-to-day activities in the workplace. This meaning was assumed by most of those answering this question, although in some cases it may be that job was understood to mean union-related activity. Of those replying "Yes" the following reasons or examples are typical of those given to the follow-up query, "In what way?".

1. I became more aware of the dynamics of employee-employer relationships and how it affects students. (from a CAUT

member)

2. I was more conscious of employee-employer relations; getting other employees involved in the association became imporant; I wanted to raise their consciousness, for example about the issues involved in crossing picket lines. I also wanted to increase their awareness of labour history. (BCGPE Assoc. member)

3. It improved my self-confidence and my negotiating techniques. In my job, within the hospital, patient care and supervisory areas demand self-confidence. We do a lot of patient teaching in my job and therefore my learnings in the union have helped me to be a wise teacher. (MONA member)

4. I am not sure I feel different. I am more capable in doing my job. I display more leadership and responsibility. (MONA member)

5. It brought to light problems of employee-employer relationships, i.e. using proper channels. Afterwards I wasn't so disgruntled and could therefore work better. (MONA member)

6. I became more comfortable with writing and communicating with larger groups as a result of the Labour Relations School. (MONA member)

7. I felt more in control of my job situation and career. (woman member of N.S. Nurses)

8. I felt more educated and more certain of myself. (male member of N.S. Nurses)

9. I felt more confident about the next round of negotiations. (woman member of N.S. Nurses)

It is clear that those reporting these changes are not totally representative of the unions in the sub-sample. Of the nine reporting changes, seven are associated with one of the two nurses' associations. However, the responses given by these nine persons are very similar to those given by other persons who replied to the the open-ended questions. For example, several members of the Teachers' Union and of the B.C. Hospital Employees' Union reported, "I gained in confidence. I feel my job is more important." Another frequently heard statement was, "My whole attitude has shifted positively. I now know my rights and I feel better able to handle various job situations. In a word, more self-confidence."

Question 10

In Question 10, we asked, "Did your position in your union (association) change in any way as a result of this event?" Of the 23 members of our random sample, 14 replied "No". Of these, however, three made the following comments:

1. I was already chairperson.
2. I was president. But I feel more competent.
3. No, but my attitude changed for the better.

The remaining nine respondents answered "Yes" and the following answers were give to the follow-up query, "In what way?".

1. I advanced in the union to the executive. (two replies)
2. I'm on more committees.
3. Elected to negotiating team.
4. Had my own ideas confirmed.
5. Have more awareness of what is happening in the union.
6. I have an increase in confidence, and an increase in flexibility and understanding.
7. I progressed to being a regional representative.
8. Promoted to representative on Provincial Board for my hospital.
9. I wanted to get quickly involved with negotiations.

Finally the following pair of statements offer interesting contrasts:

1. The course was completed after negotiations but it led me to run for the position again.
2. I stopped being a shop steward.

Question 11

Of the 23 respondents, six acknowledged that they were unaware of any other labour education activities carried out by their local (or labour organization). Of the remaining 17 persons, seven reported seminars without specifying a particular topic, and 10 (43%) of the sample cited a specific course(s) or workshop(s). Among these the following were cited:

Grievance procedures	6 persons
Contract interpretation	4
Workshops for ward representatives	3
Negotiation and arbitration	2

All 17 of these persons answered "Yes" to the follow-up question (Question 12), "Is the program relevant to what you want to know?".

Conclusions from the Qualitative Data

The words of our respondents are probably the best terms with which to summarize:

> "I think (Labour Education) makes for better employer-employee relations. I have a better insight, see the other side of the picture. I now know that the collective agreement is mutual, but has different interpretations. I wish that simple language was used."

> "My whole attitude has shifted positively. I know my rights and I feel better able to handle various job situations. In a word--self-confidence."

The respondents were overwhelmingly positive about their experiences in the labour education program and there were very few negative reactions to the evaluation activity itself. Most felt that the Federal Government had a right and a need to know how its money was being spent on behalf of labour education. A negative view expressed by one participant, "I'm quite reluctant to answer your questions. You could be anybody. You could be with the government or with the company." was nicely offset by the response of another who commented, "The telephone interview is fine. Better than a personal interview because then you lose confidentiality."

C. A Summary of Replies to the Mailed Questionnaire

The Manitoba Teachers' Society

The educational program of the Manitoba Teachers' Society is extremely varied and complex.

In 1980-81 the following were reported as educational activities: a one-week residential seminar for 70 participants was conducted on a wide range of topics; seven local meetings dealt with collective bargaining (187 participants); one- or two-day seminars were conducted on topics such as retirement counselling (206 participants--five seminars), negotiations (78 participants--one seminar), benefits (80 participants--one seminar), and bargaining (226 participants--six seminars); and individual benefit reports were sent out to every member. The overall objectives of the Manitoba Teachers' Society are clearly stated in their annual report for 1980-81:

1. To improve the effectiveness of local collective bargaining by training local level negotiators.

2. To inform the general membership on the dynamics of the collective bargaining process.
3. To inform a broad spectrum of members on the functioning and application of pension and benefit plans.
4. To counsel and assist individual members in all areas of their economic welfare.

The 1980-81 grant to the Manitoba Teachers' Society of $7,475 was used to defray some of the expenses for the total program which were calculated by the Society as $59,065 in direct costs. In the third year of the LEP (1979-80) the educational costs were cited as $62,513 with the LEP grant offsetting $7,712. We note that one of the major expenditures under this program (accounting for 36% of all costs) is the production of Individual Benefit Report Statements, a rather different form of labour education from the usual array of programs and courses offered to members of other labour organizations involved in the LEP.

When we contacted the Assistant General Secretary to inquire about the availability of names of participants in one or more of the educational events held over the fourth program year, we were advised that it was the policy of the Society not to release such names. However, he indicated that he and his office would be willing to relay as many mailed questionnaires as we would care to provide to members who had recently attended a week-long seminar on alternative bargaining strategies. Therefore, we developed the mailed questionnaire (see Appendix J).

The results of the set of True/False items have already been discussed as part of Table 2-1. For purposes of clarity, the results are summarized again in Table 2-3. It is clear that the majority of respondents found that most of these indicators were relevant to them and that they had in fact benefited from the program. In Table 2-3, we present a summary of the answers to the questionnaire. The analysis is based on the 22 completed questionnaires received by December 1, 1981. After this date an additional eight completed questionnaires were received, yielding a total return rate of 75% of the original 40 sent to the Manitoba Teachers' Society. However, these eight questionnaires were not included in the analysis.

It is clear in examining the most frequent answers given to each of the questions that the objectives of the seminar were achieved. Participants reported that:

1. They had an increase in knowledge about the topic being presented (Q1-a).
2. They were more aware of other unions' problems (Q1-b).
3. They became aware of other provinces' approaches to collective bargaining (Q3).
4. They were more knowledgeable in the area of labour and that they felt more confident in communicating this knowledge (Q4).
5. They were more aware of various factors involved in militancy and in making changes in bargaining procedures (Q5).
6. They were accorded more respect or were more visible in their union role as a result of the training (Q6).

Table 2-3

Manitoba Teachers' Society

Question #1

Would you consider each of the following statements and indicate whether each is True for you, False for you, or whether you are Uncertain.

Percent of Group Endorsing or Rejecting Statements of Twelve Potential Outcomes

	True	False	Uncertain
(a) Increased your knowledge about the topic being presented	100%		
(b) Made you more aware of other unions' problems.	100%		
(c) Increased your understanding of employees' rights.	73%	14%	14%
(d) Helped your family to appreciate union issues.	18%	45%	36%
(e) Increased your self-confidence.	45%	27%	27%
(f) Helped you to perform your role in the union.	95%		5%
(g) Increased your interest in local union issues	86%	14%	
(h) I was able to go back to my union and instruct others in the topic	77%		23%
(i) What I learned and experienced had an effect on my community	18%	32%	50%
(j) I had a chance to form good relationships with other union members	86%		14%
(k) I feel more positive about management's position as a result of the course	27%	36%	36%
(l) I want to attend more labour education events	90%		10%

Comparison of MTS Results (n=22) on "Outcomes" (T/F Item) with National Sample (n=220)

	True		Uncertain	
	MTS	Nation	MTS	Nation
(a) Increased your knowledge about the topic being presented	100%	95%		2%
(b) Made you more aware of other unions' problems	100	81		5
(c) Increased your understanding of standing of employees' employees' rights	73	83	14	9
appreciate union issues	18	47	36	14
(e) Increased your self-condifence	45	90	27	6
(f) Helped you to perform your role in the union	95	95	5	2
(g) Increased your interest in local union issues	86	87		3
(h) I was able to go back to my union and instruct others in the topic	77	81	23	9
(i) What I learned and experienced had an effect on my community	18	49	50	16
community	18	49	50	16
(j) I had a chance to form good relationships with other union members	86	91	14	3
(k) I feel more positive about management's position as a result of the course	27	66	36	14
(l) I want to attend more labour education events	90	94	10	5

MANTCH

Question #2

Considering the list above (Qustion #1), would you identify two items (outcomes) that were most important for you, personally.

Item	No. of Times Chosen
(a) Increased knowledge about topic	17
(b) More aware of other associations' problems	9
(c) Understanding of employees' rights	3
(d) Helped family to appreciate association issues	
(e) Increased self-confidence	
(f) Helped to perform role in association	8
(g) Increased interest in local association issues	1
(h) Able to instruct others on topic	
(i) Had an effect on my community	
(j) Formed good relationships with other association members	5
(k) Feel more positive about "management's" position	
(l) Want to attend more labour education events	1
(2 choices by 22 respondents = 44)	44

Question #3

Would you select one of the two statements which you identified in Question #2 and comment on it in terms of: What was it about this conference that made this outcome happen?

Reasons Given for Achievement of Valued Outcomes

Times Mentioned	Reason
8	Became aware of other provinces' approaches to collective bargaining
5	Presentation by knowledgeable and experienced people
3	Small group interactions and socialization following sessions allowed for the discussion of specific discussions/area concerns.
2	Shortcoming of other provincial systems outlined
2	Varied, informative and stimulating group
2	Ample time for questions and discussions
1	Meet others from across Canada
1	I learned a lot about collective bargaining--my first year at it
1	"Became more aware of my own principles and more aware of how my colleagues feel" (Executive)

Question #4

Did you feel any differently about your role in the association after the conference?

No	9	
Yes	11	In what way?

In What Way Do You Feel Differently About Your Role In The Association

Positive

More knowledgeable in my area, particularly labour knowledge. (2)

Made me more aware of my responsibility to inform our members of ramifications of proposed changes to our system.

More able to conduct my job as negotiator chairman.

Better informed.

Horizons had been expanded.

Felt more confident and had more knowledge to communicate. (2)

More able to lead in this area.

"That there is a need to raise the awareness of other members about employees' rights, bargaining methods and possible outcomes."

Negative

"Apprehensive in dealing with my association's members with regard to the seminar's recommendations."

Question #5

Did you feel any differently about your day-to-day job after attending the conference?

No	16	
Yes	6	In what way?

In What Way Do You Feel Any Differently About Your Day-To-Day Job After Attending The Conference?

A bit more militant, more committed to the labour cause.

More work would be necessary to prepare the membership to make knowledgeable decisions on proposed changes.

The question of strike is a delicate and emotional issue.

National issues are more of a concern.

I am more aware of "rights"

I just find things more frustrating at times.

Question #6

Did your position in the association change in any way as a result of what you learned at the conference?

No	17	
Yes	5	In what way?

In What Way Did Your Position in the Association Change as a Result of What You Learned?

More people listened to what I had to say.

I became more aware of the necessity of sharing information with other teachers.

More visible, take more initiative.

More open to some of the alternatives which were presented.

I am able to act as a resource person.

Question #7

Was this the first labour education course/workshop or conference which you attended?

Yes	8
No	14

What Other Labour Education Courses/Workshops or Conferences Have You Attended in the Last Three Years?

Collective bargaining seminars. (5)

"Too many to list".

Employee benefit seminars.

Brandon Coordinated Seminars. (7)
Labour Relations Legislation
Workplace, Safety and Health Workshop

NOTE

It is not clear from the returns whether some of these should be included under Brandon Coordinated Seminars or whether they were (all) separate seminars.

Question #8

Do you recall any media that were used as part of the program?

"Yes":		10
	Tapes	0
	Films	0
	Print	10

Do you recall the names?

Flow chart depicting relation of ATF and Ministry of Education (2)
Handouts by ATA (2)
Summaries of each province's bargaining system (2)
Schematic of Calgary's strike procedures

	Tapes & Films	0
	Film & Print	1
	Tape & Print	1
	All Three	0
None recalled		11
	Total	22

In what ways was this material useful to you?

Increased knowledge/awareness/clarification (5)
Helped record developing consensus
Helped support speaker's presentation
For examples when talking to the association at home
"Used information in preparing a detailed report and road show to present to members across the province."

Question #9

What was the primary factor that led you to attend the labour education portion of your conference?

7	To evaluate alternatives for future negotiations
5	Interest in the topic(s)--collective bargaining
5	Because of position as salary chairman or on negotiating committee.
5	Because of position as President of local bargaining unit

Question #10

Are you interested in learning more about labour education?

No	1	
No answer	1	
Yes	20	What topic?

In Which Topics Are You Interested for Future Labour Education Programs

Bargaining (10)

Working conditions (2)

Management's side (2)

Political action (2)

Impasse options (2) and their successes and failures (2)

Benefits programs

Teachers and the labour movement

Professional rights: employee rights

Paid maternity or parental leave

Bases for calculating seniority

Workplace safety

Personnel selection and evaluation

Labour law

Learning conditions of teachers

Right to strike and its consequences

Any which will allow me to do my "job" better (Salaries Committee Member and Negotiator)

"None"

No answer (4)

Question #11

Prior to this questionnaire and the accompanying letters, were you aware of any financial support received by your assocation for the purpose of conducting labour studies?

No - was not aware of support	12
Yes - was aware of support	10

What sources?	Not sure	4
	Was told at conference	1
	MTS Salaries Committee	1
	Fed. Dept. of Labour	4

Question #12

Did participation at the conference cost you money out of your own pocket?

No	16			
Yes	6:	How much?	$1-25	3
			26-75	1
			76-150	1
			151-200	1

Question #13

Can you suggest names of associates with whom we could talk?

No 18

Yes 4: 2 provided 1 name
1 provided 2 names
1 provided 3 names

Question #14

Do you wish a copy of a summary report of this evaluation? If yes, please provide name and address.

No indication	4
Does not want	3
Wishes report	15

D. Brief Case Studies

Association of University and College Employees (AUCE)

The AUCE, based in Vancouver, has received contributions in each of the last three years of the Labour Education Program. The size of the union and the amounts received were:

Years			Membership		Grant	
			Funded by LEP	Reported by Labour Canada *	Partial	Total
Yr III	1979-80	Prov. Office	2,493	2,493		$1,567
Yr IV	1980-81	Local 1	1,450	2,700	$ 898	1,427
		Local 2	634		412	
		Local 4	180		117	
Yr V	1981-82	Prov. Office	2,695	2,920	$1,717	2,840
		Local 1	1,523		1,009	
		Local 2	175		114	
						$5,834

* Figures as reported in Labour Canada publications other than those associated with the LEP.

The AUCE has conducted shop steward's seminars, produced a shop steward's manual, held a one-day seminar on grievance procedures, and held assertiveness training workshops during Years III and IV. The total cost of these events is reported as approximately $7,200 (LEP contributions of $2,994).

Note that in the third year of the Program, the Provincial Office applied for and received a grant of $1,567. Membership was reported as being 2,493 (in five locals) and the grant averaged $.62 per member. In the fourth year of the Program, three locals applied for grants separately. Their combined total membership was 2,264 and they received a total of $1,427 in federal funds. This amount averages $.63 per member. In the same year the total membership of the AUCE was reported by Labour Canada as approximately 2,700. In the fifth year of the Program, both the provincial office and two locals applied separately for funds and received a total of $2,840. In this same year Labour Canada reported the total membership in the AUCE as being 2,920; while the LEP gave three separate grants to groups reporting a total membership of 4,393. On the basis of the membership reported by Labour Canada, in the fifth year of the Program, the AUCE received a per capita grant of $.97 while all other independent labour organizations were receiving grants averaging less than $.65 per member (see Figure 3-b, Chapter 3).

The attached correspondence indicates that despite our attempts to pave the way for study of the AUCE program after personal contact with its president in May, 1981 (letter Abbey to Strand, September 9, 1981) the executive of the Association was not positively disposed to our request (registered letter Abbey to Strand, October 29, 1981; see Appendix L). As of the date of writing this report (March 15, 1982) no response to our letters has been received.

Communication from the AUCE to Labour Canada's regional office in Vancouver (see following excerpts of letter, March 26, 1981) indicates some of the turmoil affecting this Association. This turmoil may account for their reluctance to become involved in an evaluation. There is also a possibility that the somewhat irregular procedure of double-application and double-contributions received may have a role in the evaluation. A corollary of this is that Labour Canada's regional office may have neglected to monitor the applications with sufficient rigour.

In the absence of any interview data we can only remark: (a) that the quality of the educational program seems to be extensive for a rather small association; (b) that they appear to have received a disproportionately large percentage of support from the LEP (compared to other independent labour organizations); and (c) that the reluctance of their Executive to communicate with us may be an extreme--but perhaps an acceptable--outcome of the no-strings philosophy guiding the distribution of funds in this program.

Excerpts of Letter to Labour Canada in Regard to 1979-80 Grant.

Dated March 26, 1981

"AUCE Provincial has been rather distracted by a number of issues since we received the funds, which may explain the delay in filing this report: three locals have been on strike, (one of them twice) and our membership has been voting on a series of issues by mail referendum and because of the size of the membership, the work connected with administering such a procedure has severely taxed the Provincial Office. We were thus unable to complete our projects in the desired year. In fact we have recently postponed one event to the 25th and 26th of April of this year because I have been invited to (a) conference on Micro-technology . . . as our Grievance and Arbitration seminar was planned for this week-end originally, it had to be postponed. At the present time AUCE Provincial has only one paid staff and so when we have planned labour educationals (sic) and work-shops that conflict with urgent issues, they have had to be delayed."

"Our expenses related to the April 25/26 seminar are projected into the budget, all arrangements and payments have been made and the notices have been confirmed with the membership."

"We recently received a letter from your office which requested that AUCE file the attached report as soon as possible because our funding balance would not be available after March 31st."

"I hope the report is sufficient and that we may be hearing from you in the near future. I will be returning to Vancouver from Ottawa on April 6 and I shall call you on either the Monday or the Tuesday of that week. In closing I would like to say that without the Labour

Canada funding we would not have been able to accomplish the projects that we worked on, and although our funds certainly provided for a good portion of the expenses the assistance we received from Labour Canada gave us the impetus to better service our membership. We hope to apply for these grants in the future. Again, our apologies for the delay."

B.C. Government Professional Employees Association

The B.C.G.P.E. has received grants in each of the four years of the Labour Education Program under review. With a membership averaging approximately 1,000 members per year of the LEP, the total contribution available to the Association has been modest: approximately $650 per year.

In each year of the Program, the Executive of the Association has nominated two (or in one year, three) members to attend a course at the University of British Columbia. Nomination was based on the extent to which an individual had contributed to the organization through their work on committees, coupled with a judgement by the Executive that attendance at the UBC session might enhance the individual's contribution to the Association in coming years. In the words of one of the senior officers of the Association, "We invited individuals to go partly as a reward for the work which they had done and partly as a means of improving their general knowledge of the role of unions in an association such as ours."

In our contacts with the Association, we found them to be extremely cooperative in setting up interviews. Following receipt of our letter, a senior officer of the Association in Victoria contacted each of the nine members who had attended seminars, explained the nature of the evaluation project and secured promise of cooperation for our telephone interviewer. Of the nine persons on the list, we were able to make contact with six and to complete an interview with all of these individuals. A summary of their responses to our questionnaire appears in Table 2-1.

Five of the six respondents were able to provide the names of other members of the Association who might have been contacted for their comments on the possible observable outcomes of their attendance at the UBC seminar. We contacted one of these individuals (drawn at random) and his comments are as follows: "Mr. X seemed to be much more knowledgeable after the seminar. He learned in a week what it took me two years to learn. I observed him conducting meetings, controlling the speaking order, and commenting back to members on what they could or couldn't do in regard to contracts or disputes, or grievances. He seems to know what can and can't be bargained for and what can and can't be done within a contract."

The participants own reactions are best summed up in the following pair of statements from two Association members, "The course was an eye-opener. It was interesting to hear management's views. Although there were only a few employees there, they were back in the middle ages compared to management when we started. By the end of the seminar, I realized that we go in with our set of facts and that management goes in with their set of facts and that they can come back to us with as many warped facts as we can." The other member commented that, "I learned the types of games and strategies played by both sides. I learned how some of the techniques can sometimes backfire. But I also learned that even though hard bargaining is not to our liking as professionals that a more realistic interpretation of the issues on both sides would lead to more intelligent decisions on both sides." This second member also noted that the Program gave him a better understanding of labour's posturing and of the roles which both sides felt they had to play as part of the "negotiation game".

The Canadian Association of University Teachers (CAUT)

The CAUT represents a national association with approximately 50 faculty associations in universities across Canada. Grants were given to individual faculty associations (15 in total) and the monies used to send one or two persons to a national workshop on collective bargaining. While the amount of money received by each faculty association from the LEP is relatively small (between $300 and $500) it has had a large impact at the level of the Association's national office in terms of the morale and skill level of those who were able to participate in labour education for the first time.

When the first grants were received in 1978-79, the Association had just begun to consider formal training in the fields of collective bargaining and negotiations. With receipt of the initial funds, each faculty association was able to send a member to a national conference for the express purpose of learning these skills. Application for funds was encouraged by the national staff of CAUT by obtaining and sending appropriate application forms to each faculty association.

In another portion of this chapter we have commented on the impact which attendance at a national meeting had on one member of one faculty association (see case study of an individual). While these reactions are not universal among all members whose participation was supported by LEP funds, the overall level of satisfaction has been high and the skills learned are reported to have been very helpful.

In addition to the national annual conference for which the LEP funds were used, the various provincial sectors of the Association have held annual meetings at which basic tool skills were taught.

Within the executive of the Association (as represented by its president) there is agreement that providing the funds directly to labour organizations, rather than to academic agencies, is the proper policy to be followed. This position represents an interesting paradox since it implies that support should be given to organized faculty associations as workers (within the teaching environment), but not to the academic institutions within which they work.

Case Study of an Individual

While most of the case studies are based on entire locals, or associations and their programs, we can also report on a rather interesting by-product of our attempt to develop a questionnaire for the telephone interviews. Accordingly, the following notes are provided to show the effects of, or reactions to, participation in an educational event funded by LEP grants to independent labour organizations.

The participant.

The participant (Prof. A) is a professor in a social science department in a large Canadian university. She has a long-standing interest in union affairs and collective bargaining. She was an elected member of the bargaining team of her faculty association and attended a CAUT conference on Collective Bargaining. Her expenses were defrayed to a large measure by association resources, augmented by Labour Education Program funds. At the time of the conference, she was aware that funds had been made available through the Labour Education Program of the Ministry of Labour.

Reasons for attending the conference.

Prof. A reported that, while she was familiar with many of the problems of collective bargaining before going to the conference, she wanted a greater exposure to the issues which faced academics in their relatively new role as members of bargaining units negotiating with their employers.

She reported that at the end of the conference, she felt that she had received personal support for the stance which she took in relation to her fellow workers and that her position was shared by faculty association members in other universities.

In addition, Prof. A noted that she now had a larger overview of labour-related issues and that she had benefitted from feedback given to her in some of the simulation sessions.

Did participation in the conference affect her personally?

Prof. A noted that she felt better about the fact that her views were seen as appropriate stances to take in her own association. She also felt an increase in self-confidence about presenting her views.

Did participation affect her role as a union member?

She reported that while her term of office had officially expired shortly after taking the training at the conference, she was convinced that she should remain active in her association to provide a much needed sense of continuity and to bring her own version of the history of the bargaining process in her association to current negotiations.

She noted that it was hard to bring the need for involvement to the attention of others, but that she felt her continuing commitment and presence would encourage others to become involved.

Did particpation have an effect on her family or community?

Initially Prof. A was dubious about both of these as possible outcomes, but later noted that in her family she saw issues as being negotiable and that on a day-to-day basis she was more apt to negotiate matters of concern than she had been prior to the conference.

She also noted that there was, in fact, a benefit to the community, in that she had become a better spokesperson on some community issues and that she was doing some lobbying with the school board.

When asked how the training she had received was related to this outcome, she said that while she was aware of various strategies for persuasion and for developing goals prior to the conference, she learned through observation just how to facilitate the development of solidarity or unanimity and that this was helping her in her community action.

Other attitudes which were affected by participation.

"The conference helped to affirm the positive role that labour has to play in the country."

"I became more aware of labour law, individual rights, labour rights, including the rights of professionals."

"Would like a seminar in how to mobilize my peers."

"The conference was a way of putting (my) skills into action and of getting a greater sense of collectivity."

Did her associates see any difference in her behavior after the conference?

At Prof. A's suggestion, a colleague who had been involved with her in negotiations both prior to and after the conference was contacted and asked to comment on any changes which he had noted in her behavior.

He described Prof. A in her neophyte stages as someone who was "pretty green . . . who had a number of things she wanted to see happen. She was forceful and had a tendency to dig in and say, 'Here's what we want'. She was not flexible enough to seek out options for settlement. For her, the 'now' was the most important factor."

In contrast to this, he noted that after the conference she began a process which led to her becoming "more flexible and to speaking in a way that suggested an acceptable solution to the other side." She no longer "confronted with definite statements" that left the other side no room. She had shown "a growth in perspective" and had come to regard immediate solutions as the groundwork for settlements two or three years hence.

While he could not see any improvement in her command of contract language, he was aware that she became better able to manage and to contribute to the process aspects of negotiation--that is, she was able to be assertive at times but to be laid back when this was more appropriate.

Summary

The aims of the Labour Education Program would appear to have been well met in this particular case. The participant reported personal positive changes, her role in her union continued and increased, and her colleagues support the view that she learned important skills which she was able to apply in negotiations. The benefit to her family and community was also a positive outcome of the educational experience funded by the Program.

Manitoba Organization of Nurses' Associations (MONA)

The MONA received LEP support in each of the first four years of the program. A list of the activities and objectives of their programs for each of these years will indicate the breadth of concerns of this association with labour education problems:

1977-78	a two-day labour relations seminar on "Improving the Collective Bargaining Process";
1978-79	enrollment of three members in the "Interuniversities North" credit course in Labour Economics;
1979-80	production of print material to be used by MONA locals and a four-day school dealing with "The Collective Agreement: Constitution, Interpretation and Enforcement";
1980-81	three day Labour Relations School; two half-day courses in Negotiation Process and Grievance and Arbitration.

In 1979 and 1980 the Labour Relations School was jointly sponsored by MONA and the Saskatchewan Union of Nurses.

In response to our request for names of participants, we were advised, "Five persons were selected from each program since 1978 . . . The participants have been notified that they may be contacted." Thus, the large number of completed interviews with the MONA sample (see Table 1-1) may have been a reflection of this, as might their awareness of the sources of funding of the LEP.

Kingston Independent Nylon Workers Union (Nylon)

The total membership of this union is 1,100. The union has 52 stewards and a 13 member executive and trustee committee. Until recently the union was a local within the United Mine Workers of America. Prior to the initiation of the LEP grant, this union had very little training or education and, while the federal funds pay only about 25% of the annual costs of their program, this support has stimulated a good deal of educational activity. If the LEP grants are discontinued there is some question as to whether the union could continue the program at the same level, but there is a high degree of commitment to education now and efforts would be made to do so.

The education program of the Nylon Workers is both developed and utilized by a nine member executive. The funds have been used primarily for training of the executive and trustees of the union. These programs tend to follow the same pattern: an annual one-day seminar held on a weekend in December. Presentations are made by two lawyers who are on retainer. These instructors also produce and distribute information in pamphlet form as curriculum materials. The actual content of the seminar is decided by the executive who then request a presentation on this topic. It is noteworthy that the topics chosen have focused primarily on leadership training which participants then pass on to stewards in the Kingston area. Another interesting feature of this relatively small program is that on occasion, representatives of management have been invited to take part in the seminar.

Nova Scotia Nurses' Union (NSNURS)

The N.S. Nurses Union consists of approximately 2,800 members and has had a fairly recent large-scale increase in membership of approximately 500 persons. In each of the first four years of the LEP, funds of approximately $1,300 per year have been combined with other monies to support participants at the annual Eastern Nurses Labour Relations School. Each year, one person from each local is selected by the executive of that local to attend the School. These participants have tended to be the president of the local (about 60%) or other members who have ultimately gone on to become the president. The total outlay of this union for this event is approximately $12,500 each year; thus the LEP grant represents approximately 10% of the total expenditure on this type of education.

At the one-week School, courses have been offered in collective bargaining, labour history, general labour relations, assertiveness, grievance and union management, leadership and local administration and general union administration. Instructors are drawn from the participating unions and over the years have come from PEI Nurses' Association, N.S. Nurses, N.B. Nurses, several nurses' associations which are part of the Professional Institute of the Public Service of Canada, and the United Nurses of Quebec. Other instructors have been drawn from the Registered Nurses' Association of B.C. Some courses have been offered in both English and French although not all. With this diversity of programming and the movement of the School among such centres as Halifax (1980), Moncton (1979), and Truro (1978) it is clear that the participants from the NSNURS have been exposed to a wide variety of tool courses as well as to a large number of their colleagues in diverse settings. The positive regard in which the School is held is in large measure due to the shared information and feelings of solidarity which can come from such regular interchanges in a learning environment.

Christian Labour Association of Canada (CLAC)

The CLAC currently has approximately 6,000 members from locals spread throughout many different industries. Of the total, approximately 2,000 are in fact represented in collective bargaining by other unions. Membership in the Association is concentrated in Ontario with staff representatives in Alberta and British Columbia.

Throughout the term of the LEP, seminars and workshops have been held across Canada by the CLAC's Director of Research and Education. The extent of these activities in considerable: 17 seminars in as many different cities in 1978-79; increasing to 36 locations in 1979-80; and 39 in 1980-81. These seminars have covered a range of topics and approaches. In 1979-80, for example, the topics dealt with were Industrial Democracy and The Basis of Human Rights in Canada, while in 1978-79 the seminars focussed on the book, Multinationals and the Peaceable Kingdom, written by the CLAC Director of Research and Education and published commercially. Additional steward's seminars in which the CLAC's Handbook for Stewards was used as a guide were also presented. In Chapter 5, we have used this handbook as one of three in our attempt to evaluate some of the media produced with support from LEP funds. Other educational materials from CLAC are also reviewed in Chapter 5.

It is difficult to determine precisely how the LEP funds were used by the CLAC. From the files of Labour Canada it would appear that some of the grants were used to underwrite the costs of producing the two publications mentioned above (plus two others--The Adversary System and Facing the New Corporation), in addition to defraying the costs of the educational seminars.

The Police Association of Ontario

The Police Association of Ontario represents approximately 19,000 members. In terms of the LEP, this Association benefitted from the good judgement exercised by the Federal Goverment in not using the term "Labour Union" to describe the program of financial assistance to independent labour organizations. The Association is not a union under the Ontario Labour Relations Act and qualified for financial assistance only because of the inclusiveness of the designation "independent labour organization" combined with the energy and persistence of its Chairman.

The Association has used the financial assistance to strengthen a series of seminars offered to its officers across the province. Intensive assistance in negotiating, grievance procedure, and organization has been offered through these seminars. Seminars are held in different regions of the province and leadership is usually provided by the Association's officers with some additional help from outside consultants. While withdrawal of the support would probably not mean the collapse of the program, the federal assistance has allowed participation of a very much larger number of the officers according to the Chairman. He was emphatic in his view that the program has clearly contributed to smoother industrial relations through improving negotiations, reintroducing willingness to consider two-year contracts, and improving the handling of grievances.

A matter of special note in this example is the emergence of unanticipated problems encountered by the police following the passage of the Occupational Health and Safety Legislation in the Province of Ontario. The right to refuse to enter a dangerous place, among other rights, has dramatic implications for the work of police officers, and presumably fire-fighters. To avoid unnecessary conflict with the provincial authorities, a police officer was trained as a health and safety inspector. Only time will tell the wisdom of this step. It does however reflect the new demands that the interest in and support for Occupational Health and Safety has placed on all educational programs. It can be argued that a potentially imaginative solution to a problem has been made possible by federal support for education and learning in this Association.

Hospital Employees' Union (B.C.)

The HEU is an organization of 137 locals with a membership in 1981 of over 23,000. The union applied for grants in three of the four years of the program, receiving a total of $43,476.

In years 1 and II the federal funds were used to defray the expenses of educational seminars which were attended by the senior officers and staff of the union, and to prepare filmed material on the HEU Convention which was to be used to orient new delegates to the convention. The film was produced by external consultants and a note in the file at Labour Canada indicates that a cost analysis of the proposed film was requested. This analysis indicated that the proposed expenditures on the film were exessive. Nevertheless, the grant was made, the seminars held and the film produced.

By year IV of the program, the staff of HEU had designed an extensive program of educational activities which included the production of educational resources and distance learning materials and the development and implementation of an integrated program of five seminars. Each shop steward throughout the province now attends all five of these seminars. The seminars are programmed so that small group sessions are held two to three months apart and each group of participants proceeds through the series as a group, with new groups being started on the overall program every six months. Seminar groups are held at various locations throughout the province to minimize travel costs. Two of the seminars in the series were to be designed and implemented with the assistance of labour educators at Capilano College. The remainder of the seminars were designed and implemented by HEU's Director of Educational Services, R.S. McCready.

We have reviewed the educational materials designed for these seminars in Chapter 5. It was clear from our interviews with various participants in the seminars that the biggest asset to the overall program was McCready himself. Our reviewer has indicated that the educational materials are probably intended as lecture notes to be augmented by the seminar leader and would need redesigning if they were to be used solely as distance learning materials. However, we are aware that the materials are used by McCready in very effective ways during group sessions and then serve as useful reference resources between sessions.

In Chapter 2 (Table 2-1) the data indicates that those members of HEU who were interviewed represented a high proportion of repeaters in educational programs. This is the result of the fact that all those interviewed had already completed two or three segments of the seminar series.

In our opinion, the HEU program represented one of the most creative, effective and efficient uses of federal funds by independent labour organizations. The model developed by McCready could well be used by other large labour organizations. We must add that while HEU received approximately $13,000 for educational activities in year IV, the total cost of the seminar series amounts to over $160,000 annually. The federal assistance, therefore, covers only 8% of the total costs of the educational program for this labour organization.

Nova Scotia Teachers Union

The N.S. Teachers Union is an independent labour organization with 47 sections and a membership of 11,400. The union has requested and received a grant from the LEP in all four years of the program. The total amount received was $24,128. The records on file at Labour Canada show that in the fourth year of the program, the union received an amount which was considerably less than the per capita grant to which it was entitled. According to our calculations, the union was entitled to receive $7,000 and requested the full amount. However, the grant awarded was only $1,008. The discrepancy in the amount of the grant could be attributed to two explanations: (a) the union was late in making application and therefore received a limited grant; or (b) a clerical error was made in which the figure used as a membership figure (1,550 persons) was in fact the number of participants expected to attend the educational event.

In each of the four years of the program, the N.S. Teachers have used federal funds to defray the cost of an annual conference and professional development workshops related to bargaining. In the third year, the union planned and implemented an additional seminar for its professional development officers. The results of our telephone survey indicate that all respondents from the N.S. Teachers reported that they were invited to attend an educational event by the executive of the union, and our interviewer reported that most respondents described the event as involving professional development rather than labour education.

Section 2: The Contracts

Table 2-4 summarizes the total sample of 108 responses from participants in programs funded under LEP Contracts. Of these, 29 were from the Canadian Conference of Teamsters, and 79 from programs funded by the Canadian Labour Congress (11 from the Labour College, 27 from ARLEC, and 41 from programs funded through Labour Education and Studies Centres). As we noted in our treatment of the many independent labour organizations which made up the Independent sample of LEP grant programs, our focus is not on an evaluation of the individual contracts, but of the Contract component of the LEP. Accordingly, Table 2-4 should be viewed as a whole and overall trends or patterns should be considered. Nevertheless, it is obvious that several types of comparisons can be made within the table. For example, one may wish to examine the Teamsters as a unit and to compare their responses with those of the LESC respondents, or comparisons can be made within the three CLC programs. Finally, comparisons can be made between the Contract component of the LEP as shown in Table 2-4 and the Independents component as reflected in Table 2-1. In the following material, we deal primarily with some comparisons between the Teamsters and CLC samples. Commentaries are not provided on all questions and only when the pattern of responses differs from that reported in Chapter 1.

Question 4

Fifty-nine percent (59%) of the Teamsters reported that they had not attended a previous educational event compared to 30% of the CLC sample. In the CLC sample, of course, a large number (relatively speaking) of respondents were taken from among participants in the Labour College and ARLEC. Some had graduated, others were enrolled in ongoing programs. The Teamsters' intention to extend education to as many members as possible is clearly reflected in the answers to this question.

Question 6

"Thinking about the program/course/conference dealing with (insert topic), how did you select that particular educational event?"

Reasons given for attending the specific educational event, which led to the individual being selected for our study, tend to follow the the same trend for both contract groups. Among the Teamsters, the predominant answer "Invited by executive" was given by 66% of respondents and reflects the active role of the regional offices in designing and conducting courses in areas where none had been offered prior to the LEP contract.

Among the CLC respondents who indicated that they went because a friend suggested they do so, 11% are made up almost entirely of ARLEC members. Their responses indicated that colleagues who had attended ARLEC programs were extremely enthusiastic and actively encouraged respondents to become involved in the ARLEC program when the opportunity presented itself. This reason was given predominantly by those for whom this was a first event (see Question 4 X Question 6).

It is also interesting to note the greater number of respondents from the CLC (37%) who reported having gone in order to further their education or to further their role in the union (Codes 6, 7, and 8). This is not to say that these attitudes did not also apply to the Teamsters participants, but only that it was not given by them as the answer to the question being asked.

Question 4 X Question 6

From our comparison of the responses to the question "how did you select it?", it is clear that for the Teamsters the invitation from executive was a predominant factor for both those for whom the event was a "first time" and for those who had attended previous events. Among the CLC respondents for whom this event was a "first time", responses were equally divided between "invited by executive" and "to further education and/or role in the union". For those CLC respondents who had attended previous events, the most predominant response (40%) related to furthering one's education and/or role in the union.

Question 7a

"How was your participation in this event funded?"

A marked difference appears in response to this item. Among the Teamsters, 21% report that they funded attendance at the event by themselves. None of the CLC participants indicate this. This is surprising in view of the large number who reported that they were "invited". Since many of the events held by the Teamsters were in centres close to the particular local for whom the seminar/workshop was designed and were one-day seminars, it may be that answers to this question reflect the fact that there was little travel or out-of-pocket costs to this group. Sixty-six percent (66%) of the Teamster/CLC sample indicate that costs were covered by their union or local. The other large difference in responses to this question occur in the answer "CLC" (27% of CLC respondents). This answer suggests that funds came largely from the LESCs. Interestingly, one Teamster also attributed support to the CLC.

Question 7b

"How was the event funded?"

When asked where support for the educational event was derived, 51% of the Teamster respondents and 36% of the CLC respondents replied that their union had funded it. The role of the Ministry of Labour specifically was acknowledged by 24% of the Teamsters and only 8% of the CLC respondents. In contrast, the role of the Federal Government was cited by 10% of the Teamsters and 24% of the CLC respondents. These two responses taken together indicate that the existence of federal funding is known by 34% of the Teamsters and 32% of the CLC participants.

Question 8

"In some of our studies of labour education, union members have mentioned a large number of things that might have been affected through their attendance and participation in various events. Thinking specifically about the event we have been discussing, would you listen to each of the following statements and tell me whether each is TRUE for you or FALSE for you or whether you are UNCERTAIN."

The similarities between the Teamsters and the CLC members are far more obvious than any differences in terms of their endorsement of the 12 True/False items. The largest difference occurs in item 8(c) in which 97% of the Teamsters agree that their experience "Increased (their) understanding of employees' rights"; whereas only 77% of the CLC sample agreed that this was True for them. This is not surprising since the majority of the training offered by the Teamsters for the two years under review was directed at shop stewards with a focus on the handling of grievances.

In answer to the question asking the respondent to comment on the evaluation of labour education programs, 93% of the Teamsters and 94% of the CLC sample replied "Yes". Their replies, as with those of the Independent sample, can be divided into comments directed at the evaluation _per se_ and those directed towards labour education in general. Fifty-eight percent (58%) of the Teamsters commented on the evaluation, and all made positive comments. Among the CLC sample, 43% commented on the evaluaton and nearly all of these were positive (39% of the total respondents). With respect to the comments on labour education, only 24% of the total Teamsters sample made positive comments, compared to 37% of the total CLC sample.

Positive comments about labour education made by the Teamsters can be summarized by the following quotation: "There should be more. It's been a long time coming. I hope there will be more of these programs. We need them."

The positive comments among the CLC groups were much more varied, reflecting both the diversity of programs and reactions by members to these programs. For example:

> "The program has distinct advantages. You develop relationships with people from across the country. It was marvellous." (from a participant at the Labour College)

> "I better understand the way I could deal with employers. I understand the communication process better . . . feel more confident about public speaking." (a participant from ARLEC)

> "Wish there was more opportunity to attend such courses. It's hard for single parent families (to do so)." (from the B.C. LESC).

Within the CLC sample, a variety of negative comments were also made:

> "Labour Education dollars should not be spent on a 4 1/2 day course on job evaluation. It's better to do it on a week-end." (from the B.C. LESC)

> "A lot of the rank-and-file feel that they are 'professional students' at these events--they're no use to them, just a feather in their cap or excuse for a great time. (We) should make sure that the people who need to go, get to go." (from the Atlantic LESC).

Just how deeply the negative attitudes are lodged is hard to estimate. There were a few cases of respondents indicating that they did not wish to make any comment. In one or two cases, individuals indicated that they did not wish to say anything that "might harm the union". Thus, the Neutral Comment figures in the table may involve some protective or defensive opinions. Clearly, even with the neutral comments added to the negative comments, positive reactions would still predominate for both the Teamsters and the CLC.

Question 4 X Question 8

The percentages for both samples are extremely high. Among the Teamsters who had not attended a previous labour education event, 88% indicate they would like to attend another compared with 92% of the CLC sample. Among those who had attended previously, the figures are a little higher, 91% and 94% for the two groups respectively.

Question 9

"Did you feel any differently about your job after this program?"

Both samples have approximately the same responses to this question with 48% of the Teamsters and 51% of the CLC sample indicating that they felt differently about their job (i.e. their employment rather than their union role) after the labour education program. Interpretation of these figures is, however, difficult. For example, here are quotations from two members of the Labour College:

> "My job is not as satisfying now." (Two other commented similarly and used the terms "boring" or "dull" to describe their feelings about their job after the course.)

> "The Labour College is very intense. You're learning things not used in the union. When you come back to your job it's a little bit hard to handle. You're doing a job in which you're not using what you learned. That's one negative aspect of it."

Other comments indicate some of the outcomes that participants experienced:

> "(After the course) I had more uncertainty about the future."

> "(I) became more in tune with (my) work environment. (I) conducted work place inspection meetings and now communicate more with (the) supervisor."

> "(I) feel more frustrated. I have a larger view of society; (this) creates more frustration. (I have a) greater understanding of power forces at work. (We have) less freedom than we think."

What is clear is that for those who responded "Yes" to this item there was a very broad range of effects, many of which proved to be unsettling. Depending on one's orientation to the work-place, it might be argued that dissatisfaction with one's job is a highly positive outcome of an educational program. It could also be argued, although we are not doing so here, that it is the role of education to create dissatisfaction with the status quo. Whatever one's philosophic persuasion, it is apparent that a great many participants went back to their job with a different set of attitudes and feelings.

Question 10

"Did your position in your union (or association) change in any way as a result of this event?"

Less than half of both samples reported any change in their position within their labour organization as a result of the educational event. Within the 33 persons in the CLC sample who replied "Yes" to this question, 17 said that they had become more active in committee work or in union business generally. Of the remainder, six indicated that they had become either a committee chairperson or the president of their local; and 10 reported that they now did a better job within the union, had a more positive attitude towards the union (four responses), or that they had been asked to take on more responsibility (3 responses). When there were changes attributed to the educational events, they appear to have been substantial ones, and all of these appear to have ben supportive of the functioning of the labour organizations at either the local level or within regional or national organizations.

Within the Teamsters, only 10 participants (33%) indicated a change attributable to the educational event. Within this number, one indicated that he had changed his role by being elected shop steward. Quotations from the others will indicate that for this sample the majority of changes tended to be associated with knowledge or attitudes:

> "More realistic position. Helped me understand younger members better."
>
> "There are two sides to a coin. (I) learned to see both sides of the problem."
>
> "I'm harder toward management."
>
> "The union is a necessity even if workers go over-board sometimes."
>
> "I make a mistake. Now I know what I would do differently."
>
> "I no longer fight useless battles--but I push worthwhile fights further."
>
> "I became more militant--but fairer."

Question 11

"What other labour education activities are carried out by your local (or chapter)?"

Nearly three quarters of the CLC sample were aware of other educational programs offered by their local or chapter. Of 55 persons replying that they were aware of other programs, 22 (40%) indicated that they were aware of programs for shop stewards. Within the Teamsters sample only three of 17 persons (18%) indicated an awareness of programs for shop stewards. These figures should be regarded with great caution. The base-lines are vary small and the (statistical) margin of error is large. The figures are meant as summaries and not necessarily as pointing to real differences.

In addition to programs for shop stewards, a wide variety of topics are mentioned within both samples. There is no discernable tendency for the CLC respondents to name any one topic more than others but to mention a wide variety of courses and seminars (e.g. occupational health and safety, assertiveness, study of the labour code, women in workforce, collective bargaining and arbitration). Within the Teamsters there is more focus on safety and health than on any other topics.

Question 12

"Is the program relevant to what you want to know?"

In reply to Question 12, three respondents in the CLC sample (only 5%) had a negative reaction to the existing program. Within the ARLEC group, two respondents commented that the courses were "over my head"; and in the LESC sample, one of the participants stated that "there should be more courses on public speaking". In the Teamsters sample, four respondents indicated some level of dissatisfaction as indicated in the following comments:

> "Learned about federal law. Did not cover problems of diversity in unions. There should have been more direct input from provincial and federal governments to talk about industrial health."
>
> "Courses are too short. (They) should be at least 4-5 days and not on weekends."
>
> "Courses should be made specific to our union."
>
> "(Should have been given) greater details. Focus on negotiations (with) more discussions."

These comments reflect a mixed set of reactions. When one respondent says a program is not relevant because it is too short then an inference may be made that the content is acceptable and relevant but insufficient. In any event, the numbers here are small. The overwhelming response was positive for both samples.

Question 13

"Do you recall any TAPES, FILMS, or PRINT MATERIAL that were used as part of the program?"

The use of media within educational activities appears to have been quite different for the two Contract samples. Only 24% of the CLC respondents reported the use of print material alone; whereas 66% of the Teamsters reported print alone. Within the CLC sample, all reports of print in combination with other media only amounts to 53%, a frequency which falls short of the Teamsters total. The variation in media seems much greater within the CLC activities, reflecting the greater diversity of programming, and since it includes both ARLEC and Labour College events; a greater maturity of programming. Six of the Teamsters (21%) reported no use of any media; while 11 respondents (14%) in the CLC sample indicated that none of three types of media were used. Responses to the question as to how materials were helpful indicated that, in nearly every case, print material was used as a continuing reference while the films and tapes were most important in supporting the actual course or seminar presentations.

Question 14

"We are interested in contacting others with whom you have worked since the conference/workshop who might have noticed any differences in how you have approached union or labour problems. Do you think there are any of your colleagues that we could talk to about this, and could you give us the names of two or three that you think might be willing to talk to us in an interview sometime in the next week or so?"

Thirty-eight percent (38%) of respondents in the Teamsters sample could not provide us with the names of any colleagues whom we might interview to determine whether there had been any noticeable effects from the individual's participation in the LEP-sponsored event. In none of these cases was a reason given for not providing any name. In the CLC sample, 18 respondents (27%) could not provide a name (nearly all from LESC events); and in these cases, two explained that they had moved into national or regional executive positions and therefore could not think of anyone who could comment on any changes. The remainder had no comment or reason.

In both Contract samples, those who could provide names, provided an average of two names each. We believe that providing the names of other colleagues--as many as three in some cases--is a strong indication of the participant's beliefs that they had in fact acquired new skills or behaviours that were of an enduring nature beyond the end of the educational event and that these changes would be observable by others.

Table 2-4

Summary of Interviews for Contract Participants

Question	Team-sters (n=29)	Labour Coll. (n=11)	ARLEC (n=27)	LESC's (n=41)	Total (n=108)	Percentages Team sters (n=29)	CLC (n=79)
Q. #4. Was that the first labour education course in which you were involved?							
1 Yes	17	0	14	10	41	59*	30%
2 No	11	11	13	29	64	38	67
Q. #5. What other ones did you attend in the last three years?							
1 Labour relations			1		1		2
2 Shop steward	1	2		4	7	8	11
3 Labour code/law/economics	1	1		3	5	8	7
4 Occ. health & safety	1	1	1	3	6	8	9
5 Collct. agrmt./bargaining		1	2	1	4		7
6 Leadership/instructor training		3		1	4		7
7 Arbitration/grievances	5	1			6	29	2
8 Courses > 3 years ago	2	1	5		8	17	11
9 Parliamentary procedure							
0 Topic unspecified or "other"	2	1	4	20	27	17	45
Q. #4 vs. Q # 5.							
If answer "Yes" to Q. #4 (i.e., this was the first labour education course in which you were involved), what other courses did you attend since then?							
1 Labour relations				1	1		4
2 Shop steward							
3 Labour code/law/economics							
4 Occ. health & safety							
6 Leadership/instructor training							
7 Arbitration/grievances							
8 Courses > 3 years ago							
9 Parliamentary procedure							
0 Topic unspecified or "other"			3		3		13
Total replying "Yes"	(17)		(14)	(10)	(41)	100	83

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* Where figures do not add to 100%, this reflects missing answers.

Question	Team-sters (n=29)	Labour Coll. (n=11)	ARLEC (n=27)	LESC's (n=41)	Total (n=108)	Percentages Team sters (n=29)	Percentages CLC (n=79)
If answer "No" to Q. #4 (i.e., this was not first labour education course), what other courses did you attend in the last three years?							
1 Labour relations			1		1		2
2 Shop steward	1	2		4	7	9	11
3 Labour code/law/economics		1		3	4		8
4 Occ. health & safety	1	1	1	3	6	9	9
5 Collct. agrmt./bargaining		1	2	1	4		8
6 Leadership/instructor training	5	3		1	9	45	8
7 Arbitration/grievances		1			1		2
8 Courses > 3 years ago	2	1	5		8	18	11
9 Parliamentary procedure			3		3		6
0 Topic unspecified or "other"	2	1	1	17	21	18	37
Total replying "No"	(11)	(11)	(13)	(29)	(53)		
Q. #6. Thinking about the program/course/conference: How did you select it?							
1 Supervisor suggested I go	1			1	2	3	1
2 Went with friend ("outing")		1	8		9		11
3 Read about it in union pub.	1	4	3	1	9	3	10
4 Nominated by co-workers	2			6	8	7	8
5 Invited by executive	19	1	7	12	39	66	25
6 To further my education	3	2	4	3	12	10	11
7 To further my role in union	1		5	6	12	3	14
8 Code 6 + another reason	2	1		8	11	7	11
9 Code 7 + another reason							
0 Code 6 + Code 7				4	6		8

Question	Team- sters (n=29)	Labour Coll. (n=11)	ARLEC (n=27)	LESC's (n=41)	Total (n=108)	Percentages Team sters (n=29)	Percentages CLC (n=79)
Q. #4 vs. Q. #6							
If this is your first labour education event, how did you select it?							
1 Supervisor suggested I go	1				1	6%	
2 Went with friend ("outing")			6		6		25%
3 Read about it in union pub.	1		2		3	6	8
4 Nominated by co-workers				2	2		8
5 Invited by executive	12		3	4	19	71	29
6 To further my education	3			1	4	18	4
7 To further my role in union			3	2	5		21
8 Code 6 + another reason				1	1		4
9 Code 7 + another reason							
0 Code 6 + Code 7							
Total replying "Yes"	(17)		(14)	(10)	(41)		
If this is *not* your first labour education event, how did you select it?							
1 Supervisor suggested I go				1	1		2%
2 Went with friend ("outing")		1	2		3		6
3 Read about it in union pub.		4	1	1	6		11
4 Nominated by co-workers			1	4	5		9
5 Invited by executive	7	1	3	8	19	64	23
6 To further my education		1	4	2	7		13
7 To further my role in union			2	4	6		11
8 Code 6 + another reason	2	1		7	10	18	15
9 Code 7 + another reason		1			1		2
0 Code 6 + Code 7		2		2	4		8
Total replying "No"	(11)	(11)	(13)	(20)	(64)		

Question	Team-sters (n=29)	Labour Coll. (n=11)	ARLEC (n=27)	LESC's (n=41)	Total (n=108)	Percentages Team sters (n=29)	CLC (n=79)
Q. #7a. How was your participation in this event funded?							
0 No answer				3	3		4%
1 Paid for it myself	6				6	21	
2 Paid for part myself	1	2	1	1	5	3	5
. . . the rest of the costs?							
3 "Scholarship"--Labour College		5			5		6
4 Union or association	19	4	11	21	55	66	46
5 Company							
6 Provincial government			3		3		4
7 "Government"	1		4	2	7	3	8
8 CLC	1		7	14	22	3	27
9 Did not wish to say	1		1		2	3	1
Q. #7b. How was the event funded?							
1 Teamsters/CLC	3	5	5	16	29	10	33%
2 DREE or Int'l. Teamsters	1		3		4	3	4
3 Provincial government		3	2	1	6		8
4 Union (unspecified)			1	1	2		3
5 Other	1			1	2	3	1
6 Association dues	12	1		1	14	41	3
7 "Labour Ed. Program"				3	3		4
8 Ministry of Labour	7	1	4	1	13	24	8
9 Federal grant	3		10	9	22	10	24
0 Doesn't know; won't guess	2	1	2	8	13	7	14

							Percentages	
Question		Team-sters (n=29)	Labour Coll. (n=11)	ARLEC (n=27)	LESC's (n=41)	Total (n=108)	Team sters (n=29)	CLC (n=79)
Q. #8. (See Table 1-3, footnote (c))								
a Increased knowledge about topic	T	22	11	26	35	99	90	96
	F	2			2	4	7	4
	?				2			
b More aware of other unions' problems	T	22	11	25	34	92	76	89
	F	4		2	5	11	14	9
	?	3						
c Increased under-standing of employees' rights	T	28	9	23	29	89	97	77
	F		1	3	4	8		10
	?	1	1	1	6	9	3	11
d Helped family to appreciate union issues	T	14	8	20	16	58	48	56
	F	11	2	5	19	37	38	33
	?	4	1	2	4	11	14	14
e Increased self-confidence	T	28	10	27	33	98	97	89
	F	1			3	4	3	4
	?		1		3	4		5
f Help to perform role in own union	T	29	1	26	35	101	100	91
	F				3	3		4
	?			1	1	2		3
g Increased interest in local union issues	T	25	8	25	32	90	86	82
	F	3	3	2	5	13	10	13
	?	1					3	
h Able to instruct others in topic	T	23	8	25	25	81	79	73
	F	2	1	1	9	13	7	14
	?	4	2		5	11	14	9
i What was learned and experienced had effect on community	T	16	5	24	18	63	55	59
	F	9	2	2	12	25	31	20
	?	4	4	1	9	18	14	18
j Chance to form good relationships with other union members	T	26	11	27	37	101	90	95
	F	3			1	4	10	1
	?							
k Feel more positive about management's position	T	21	8	18	23	70	72	62
	F	7	3	6	8	24	24	22
	?	1		3	8	12	3	14
l Want to attend more labour education events	T	26	10	25	38	98	90	91
	F			1		1		1
	?	3	1	1	2	7	10	5

						Percentages	
Question	Team-sters (n=29)	Labour Coll. (n=11)	ARLEC (n=27)	LESC's (n=41)	Total (n=108)	Team sters (n=29)	CLC (n=79)
Do you have any comments on this evaluation?							
Yes	27	10	27	37	101	93	94
No	2	1		2	5	7	4
If "Yes":							
Positive re. evaluation	17	5	9	17	48	58	39
Negative re. evaluation		1	1	1	3		4
Positive re. lab. ed. program	7	2	15	12	36	24	37
Negative re. lab. ed. program			1	2	3		4
Neutral comment	5	3	1	5	14	17	11
Q. #4 vs. Q. #8(1).							
If this is your first labour education, do you want to attend more labour education events?							
Yes	15		13	9	37	88	92%
No	2				2	12	8
Not sure			1	1	2		
If this is not your first labour education event, do you want to attend more?							
Yes	10	10	12	28	60	91	94%
No	1		1		2	9	2
Not sure		1		1	2		2
Q. #9. Do you feel any differently about your job after this program?							
Yes	14	7	17	16	54	48	51
No	15	3	10	23	51	52	46

Question	Team- sters (n=29)	Labour Coll. (n=11)	ARLEC (n=27)	LESC's (n=41)	Total (n=108)	Percentages Team sters (n=29)	CLC (n=79)
Q. #10. Did your position in your union change in any way as a result of this event?							
Yes	10	7	14	12	43	34	42
No	19	4	13	27	63	66	56
Q. #11. Other labour education activities carried out by your local (chapter).							
Yes	17	11	18	26	72	59	70
None named	8		8	12	28	27	25
Q. #12. Is the program relevant to what you want to know?							
Yes	13	11	16	25	65	76	95
No	4		2	1	7	24	5
N/A	10		8	14	33		
Q. #13. Do you recall any (media) that was used as part of the program?							
None used	6	2	1	8	17	21	14
Tapes	1		1	3	5	3	5
Films	1		1	10	12	3	14
Print	19	1	11	7	38	66	24
Tapes and film				3	3		4
Films and print	1	7	11	5	24	3	29
Tapes and print	1	1		2	4	3	4
All three			2	3	5		6
Q. #14. Number of associates named for future contact.							
0	11	2	1	18	32	38	27
1	7	1	7	13	28	24	27
2	8	4	18	6	36	28	35
3	3	4	1	2	10	10	9
Do you wish a summary report of your evaluation?							
Yes	28	10	26	32	96	97	86
No	1		1	1	3	3	3

CHAPTER THREE

Organizational and Educational Activities of Labour Organizations

The assessment presented in Chapters 1 and 2 of this report provides the principal measure of the success or failure of the Labour Education Program with respect to the primary objectives stated by Labour Canada (see Appendix C) in establishing the program in 1977. This assessment has described who learned what, with what long- or short-term implications for both individual members and labour organizations. If the programs are to continue in any form, it is also of some importance to examine the developments associated with the overall organizational, educational, and financial activities of the labour organizations involved.

In this chapter we propose to describe the following:

1. Historical background, organization, objectives and financial activities of the Labour Education Program (LEP) of Labour Canada;
2. Organizational, financial and educational activities arising from grants to independent labour organizations;
3. Organizational, financial and educational activities of the Canadian Conference of Teamsters; and
4. Organizational, financial, and educational activities of the Canadian Labour Congress.

In addition to this analysis, the size, scope and quality of the educational systems which were stimulated, if not actually created, by financial support from Labour Canada, merit attention. We will consider the means by which these systems have been achieved and the relevance of these systems both to the labour movement and to adult education in Canada.

Section 1: The Labour Education Program

1.1 Background: The Labour Education Program

On May 20, 1977, the Minister of Labour announced that an agreement had been concluded between the Government of Canada and the Canadian Labour Congress in which the Government "in recognition of the vital contribution made by the Canadian Labour Congress and its affiliates to the economic and social well-being of all Canadians, desires to support the initiates of the Congress in providing programs of labour education for its membership"[1] The Government's financial contribution was to be $2 million a year for five years, "augmented for each program year after the first year by an inflation factor determined by the application of the Consumer Price Index for the previous fiscal year."[1] For its part, the Canadian Labour Congress agreed to "establish a National Labour Studies Centre and five Regional Labour Studies Centres, and specific programs and educational projects necessary for the conduct of a labour education program."[1]

The intention of the Government of Canada to engage directly, and on a large scale, in the support of labour education had been announced in the Speech from the Throne on October 12, 1976. In announcing its intentions with respect to labour management relations following the termination of wage and price controls, the Government stated:

> The improvement of labour management relations in Canada is an essential pre-condition of economic stability. . . . The solution (to loss of productivity and increased social tensions) is not to

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[1] Agreement between the Minister of Labour and the Canadian Labour Congress (File No. 690-5-3), signed May 20,1977, tabled in the House of Commons July 15, 1977. House of Commons Debates, 2nd Session, 30th Parliament, Vol. VIII, 1977, p. 7712.

> be found in excessive restriction of collective bargaining but rather in the development of better mechanisms for settling disputes in a less adversarial, more cooperative manner.
>
> The Government therefore intends to work with the provinces and with labour and business communities to develop a number of initiatives aimed at improving labour management relations. It is intended to establish a collective bargaining information centre. . . . It is also intended to encourage greater participation by plant workers in decisions affecting their working conditions; to expand labour education programs; to develop a voluntary code of fair practices; and to establish a national institution dedicated to improving the quality of life in the workplace.[2]

The information release on May 20, 1977, also contained references to the provision of an additional $600,000 for similar support for labour organizations not affiliated with the Canadian Labour Congress, and for grants both to educational agencies providing programs of labour education and to individuals. These activities were to be administered by a National Advisory Council on Labour Education to be established by Labour Canada.

On August 18, 1977, the Minister of Labour announced further details of the program to complement the agreement with the Congress. The details included the facts that over the succeeding two years, $1.5 million would be available for labour organizations not affiliated to the Canadian Labour Congress and to post-secondary educational institutions. In the case of non-affiliated labour organizations, grants were to be made on the basis of $.80 per member.

On November 24, 1977, the Minister of Labor announced that grants totalling $57,141 had been made and that the number of requests for grants had exceeded all expectations. In December 1977 and January 1978, new contractual agreements, similar to that existing with the

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[2] Speech from the Throne, House of Commons Debates, October 12, 1976, 2nd Session, 30th Parliament, Vol. I, 1976, pp. 2-3.

Canadian Labour Congress, were signed with the Canadian Conference of Teamsters for $75,000 per year and with the Confédération des Syndicats Nationaux for $160,000 per year, each for five years. A year later, a similar agreement was signed with the Centrale des Syndicats Démocratiques for $34,000 for four years. This brought the total number of long-term contracts to four. As in the case of the Congress, these later contracts included the indexing factor.

Table 3-1 summarizes the actual dispersement of funds within the various components of the LEP during its first four years in operation. The figures shown in Table 3-1 are for the fiscal year from April 1st to March 30th. All other figures reported in this chapter on financial data are for program years which extended from July 1st to June 30th.

The labour movement in Canada has been concerned with education since its beginnings. In some cases, concern for education has been expressed through various independent organizations, such as the Workers' Education Association; but the mainstream has always focused on education provided by major labour organizations for their own members. Objectives have varied from the development of members' skills in collective bargaining, to handling grievance procedures, to increasing understanding of the nature and function of unions and the labour movement, to providing greater awareness of community processes and affairs, both locally and nationally. Over the years, it has become an accepted fact that "labour education is provided by the unions, for the unions, to make them more effective instruments of workers' collective interests in the workplace and in the local and national community."[3]

TABLE 3-1

FEDERAL GOVERNMENT LABOUR EDUCATION FINANCIAL SUPPORT PROGRAM
Distribution of Funds for Years I-IV (1977-1981)
(Fiscal Year: April 1st to March 31st)

Program Component	Year I (1977-78)		Year II (1978-79)		Year III (1979-80)		Year IV (1980-81)		TOTALS	
	$ Amounts	%	$ Amounts	%	$ Amounts	%	$ Amounts	%	$ Amounts	%
1. Contracts										
Canadian Labour Congress (includes ARLEC for Years II, III, and IV)	$1,500,000	(69.5)	$2,300,000	(80.2)	$2,565,600	(81.5)	$2,803,599	(81.5)	$9,169,199	(78.9)
Confederation of National Trade Unions	120,000	(5.6)	170,560	(5.9)	186,092	(5.9)	203,356	(5.9)	680,008	(5.9)
Canadian Conference of Teamsters	56,250	(2.6)	79,950	(2.8)	87,231	(2.8)	95,324	(2.8)	318,755	(2.7)
Centrale des Syndicats Democratiques	------		25,500	(0.9)	36,346	(1.2)	39,717	(1.1)	101,563	(0.9)
2. Grants to Independent Unions	265,869	(12.3)	278,111	(9.7)	261,758	(8.3)	289,162	(8.4)	1,094,900	(9.4)
3. Bursaries to Individual Union Members	10,000	(0.5)	14,541	(0.5)	9,200	(0.3)	10,535	(0.3)	44,276	(0.4)
4. Contributions to Post-Secondary Programs	205,767	(9.5)	Program discontinued in August 1978						205,767	(1.8)
TOTALS	$2,157,886	(100%)	$2,868,662	(100%)	$3,146,227	(100%)	$3,441,693	(100%)	$11,614,468	(100%)

Note: The disbursements detailed above will differ somewhat from financial data shown for each section of the LEP. The figures above are based on the federal government's fiscal year (April 1st to March 31st), while other financial data are reported by program year (July 1st to June 30th).

In 1956 two major labour organizations, the Trades and Labour Congress and the Canadian Congress of Labour, were amalgamated. At that time, both organizations had full-time educational officers whose work was supplemented by educational officers in many of the major affiliates. The Congress founded the Labour College of Canada in 1963. By 1974, a specially commissioned study of the educational activities of the Congress reported that 10% of the total budget of the Congress was devoted to education.[4]

At the tenth Constitutional Convention of the Congress, held in Vancouver in 1974, a decision was made to proceed with a feasibility study of a national Labour Education and Studies Centre (Resolution #495). This study, submitted to the Executive Council of the Congress in 1976, reported a general consensus of support throughout the Congress for a study centre that would be residential in nature, that would concentrate on advanced training of various kinds, that would be financed by a variety of means including support from the Federal Government, and that would be controlled and operated by the trade union movement. The study concluded that "the need now is for government to recognize the role of trade unions in education, and the entitlement to government financing for this purpose."[5]

Direct participation in labour education by the Federal Government is considerably more recent than by the labour movement.

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[3] Memorandum, "A Labour Education Program for the Canada Department of Labour". A Preliminary Report by G. Clack, Employment Relations Branch, Labour Canada, February 27, 1976.

[4] C. Verner and G. Dickinson, Union Education in Canada. Vancouver: University of British Columbia, 1974.

[5] "A Labour Education and Studies Centre for Canada", Report of the Feasibility Study Committee of the Canadian Labour Congress. Ottawa: Canadian Labour Congress, 1976.

There is no record of participation by representatives of the Federal Government in the first national conference on labour education in Canada held in 1956. However, at the next conference, held in 1975, government representatives played a prominent role. During the intervening nineteen years, the Federal Government had become increasingly responsive to the claim by labour representatives of a legitimate role for the labour movement in Canada in the development of the national economy. During the same period of time, a corresponding belief had developed in the contribution of labour education to the quality of that role. A Labour Canada memorandum of November 1975, indicates growing government interest in labour education:

> Historically, labour education programs have been aimed mainly at encouraging social changes by building better unions and developing more effective union leadership. Government interest in these programs lies in the effects they have in promoting smoother collective bargaining and industrial relations, and in the growth of broader community interests and social responsibilities.

The government had also accepted the positon that labour education, even if supported by public funds, must be under the control of the labour organizations involved. The government argued that, in consequence of such support, the resulting educational activities must be maintained separately, both financially and administratively, from the ongoing affairs of the labour organizations. Finally, the government had come to accept the position of the labour movement with respect to entitlement to a share of public funds for labour education purposes. At that time, the existing stereotype of the typical union member was of an individual with little formal schooling and little access to rapidly developing facilities for continuing education. This stereotype was in contrast to the general perception of members of management as successfully using the formal educational system and participating in all forms of tax-assisted continuing education. The Minister of Labour commented:

> As many far-seeing members of this House perceive, we must depolarize the situation, and try to bring these parties together. They must realize that a well-functioning economy is in their own interest, that everyone has a stake in profits and progress. . . . when we talk about grants to labour organizations to get on with the educational process that is so badly needed in that area, we are only dealing equally with them as we are with the business community.[6]

By 1977, the Federal Government was contributing annually to the support of the Labour College of Canada and to the Atlantic Region Labour Education Centre. Federal assistance had also been provided for the feasibility study.

The major impetus for the provision of financial support to labour education, as represented by the current relationship between the Federal Government and the labour organizations, came from the Canadian Labour Congress and its affiliates. There had been developments in other sectors prior to the inauguration of the agreements. For example, two provincial plans for the establishment of Labour Education Centres had been abandoned as a result of changes in provincial governments.

Both the CNTU and the CSD had educational programs, with associated personnel, as did a number of the larger non-affiliated labour organizations. Each of these organizations was engaged in a growing number of tool courses and many were offering courses and seminars dealing with more general issues. Furthermore, some of these organizations had been sending students to the Labour College.

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[6] House of Commons Debates, June 20, 1977, 2nd Session, 30th Parliament, Vol. VII, 1977, p. 6869.

A 1978 survey of post-secondary educational agencies,[7] conducted for Labour Canada by the Canadian Association for Adult Education, indicated that, prior to 1977, of the 178 agencies surveyed, 31 (17%) reported being involved in some form of labour-related education, including both labour and worker studies, industrial and labour management relations. This small number lent some weight to the suspicions, then current in the labour movement, about general indifference by the formal educational system toward labour education in Canada. Where such programs did exist, some cooperative relationships had developed, providing foundations on which to extend and build services.

1.2 The General Design of the Labour Education Program

In any society there are three principal means for a government to engage in the support of particular educational objectives:

(i) Support can be provided for agencies or teachers providing services which, under varying degrees of control by the government, set out to develop and implement programs for specifically identified individuals or groups within the society;

(ii) Support can be provided directly to specific individuals who are thereby encouraged to seek out their own education, usually through the services of providing agencies; and

(iii) Support can be provided for private organizations, which represent specific individuals, to encourage them to provide educational opportunities for those whom they represent and to accomplish such provision, under some supervision, either by themselves or in concert with providing agencies.

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[7] "Survey of Post-Secondary Institutions in Canada." Report of a survey undertaken for Labour Canada by the Canadian Association for Adult Education, 1978.

Canada, like all other industrial societies, engages in all three types of support in various combinations with specific emphasis on one method, as opposed to others, varying from time to time and from objective to objective. For example, the treatment of returning veterans in 1946 and after provides a clear example of individual subsidization, with some support also being given to the providing agencies. During the educational boom of the 1950's and 60's the overriding practice was to support the providing agencies and to create many new ones, with some subsidization being given to individuals. The emphasis on one method of support as opposed to others results in different consequences. It is these different consequences which must be taken into account in any evaluation of the results obtained in response to the initial choice of the means to support specific educational objectives. For example, providing support primarily to representative organizations also ensures the support of the varied organizational dynamics required in achieving the desired goal. Such a choice, however, may mean that the existing rigour and technical expertise in providing educational agencies is not used and that the initial stages of programming may be uneven in quality while the staff of the representative organization develops its own expertise. To choose to support individuals guarantees high levels of motivation for learning among individual recipients, but may not take advantage of the services and resources to be found in providing agencies and the productive impact of the results of individual learning may be too diffuse. To choose to support providing agencies may bring into full utilization all the expertise and resources of the agencies, but may result in diffused or inappropriate responses to the learning needs of individuals and representative organizations.

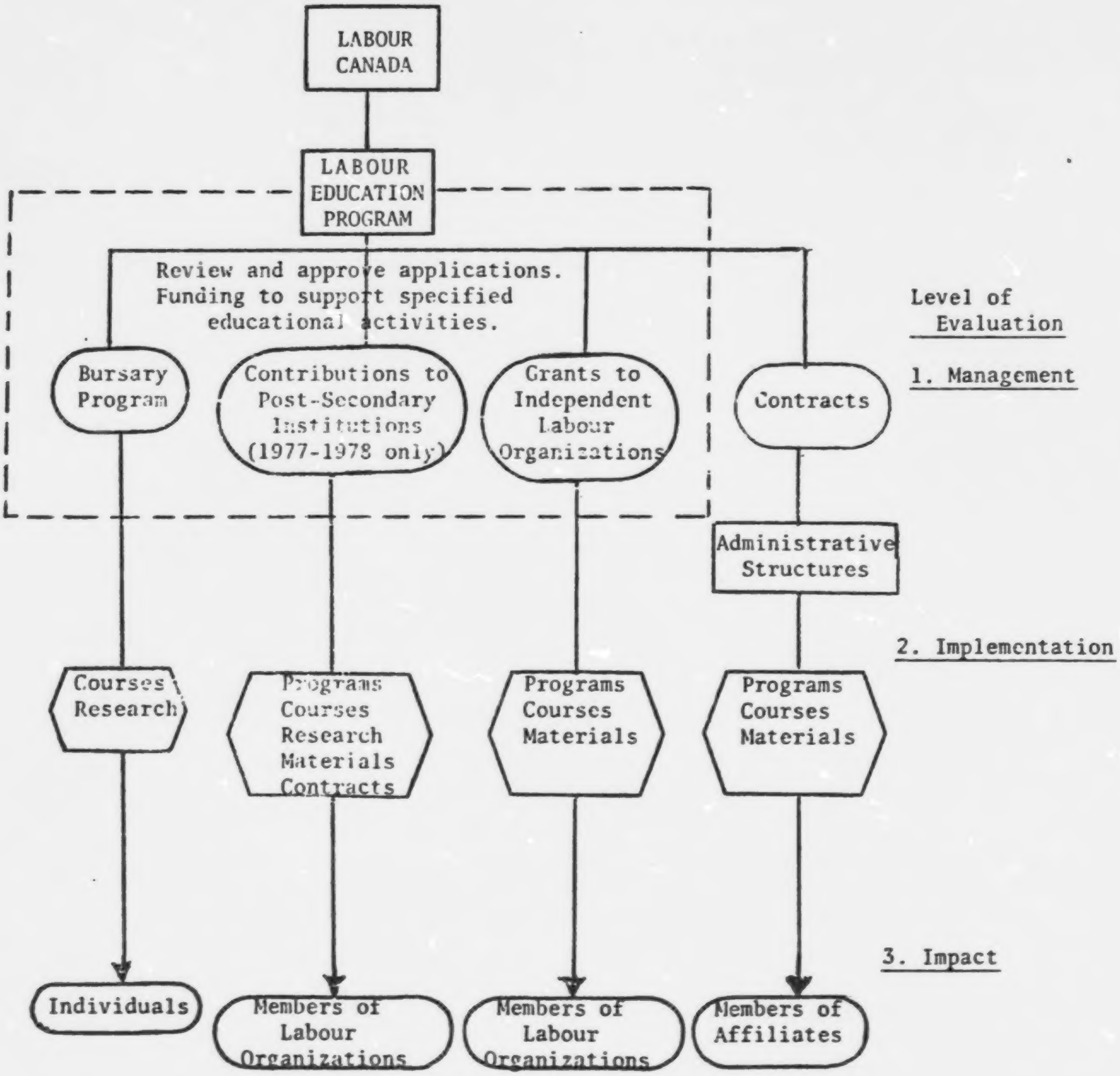
The design of the LEP embraced all three alternatives but placed different levels of support at the disposal of each (see Figure 3-a). Major assistance was provided directly to the representative organizations. This choice was based on the historically uneasy relationship between formal providing agencies and the labour movement in Canada, the limited attempts of most formal agencies to cater to the special needs of labour organizations, and the ideological character of the labour movement as an identifiable segment of Canadian society. Support to labour organizations took two forms. First, funds were provided through four- and five-year contracts with the principal federations of labour (representing about three-quarters of organized workers in Canada). Each contract involved a guaranteed annual grant with a built-in inflation factor. Second, program grants were provided to independent labour organizations (i.e. those unaffiliated with federations of labour) on the basis of a per capita grant which was applied for annually.

The federations which held contracts were required to carry out labour education activities under financial and administrative structures separate from those supporting the federations' regular activities; to provide annual reports and future financial and program estimates; to submit to an annual financial audit by the

FIGURE 3-a

LABOUR EDUCATION PROGRAM

Relationships among Component Parts


LABOUR CANADA
LABOUR EDUCATION PROGRAM
Review and approve applications. Funding to support specified educational activities.
Level of Evaluation
Bursary Program
Contributions to Post-Secondary Institutions (1977-1978 only)
Grants to Independent Labour Organizations
Contracts
1. Management
Administrative Structures
2. Implementation
Courses Research
Programs Courses Research Materials Contracts
Programs Courses Materials
Programs Courses Materials
3. Impact
Individuals
Members of Labour Organizations
Members of Labour Organizations
Members of Affiliates

Auditor General of Canada, and to participate in program evaluation activities at the end of the second and fourth years of the initial contract. The Federal Government was to be represented, both nationally and regionally, on administrative boards in a non-voting capacity.

Independent labour organizations submitted specific proposals for educational activities which were given cursory evaluations by regional and national offices. Grants were made on a per capita basis, with the total amount of funds available being set on a yearly basis and this amount divided as equitably as possible among successful recipients. One-quarter of the grant to any independent labour organization was withheld until a final financial and program report and evaluation was filed with Labour Canada.

Simultaneously, but on a much smaller scale, the LEP set out to assist individuals in carrying out independent learning programs, and to improve the resources of providing agencies for planning and implementing programs in labour education. Individuals received bursaries of not more than $5,000 in any given year from a relatively small amount of money ($15,000) made available in each program year. Individuals could renew their bursary from year to year up to a total of $15,000 per individual. Bursaries were limited to individuals who were members in good standing in labour organizations with the confirmed support of the officers of those organizations, and learning programs were to be limited to research projects or courses taken for credit at recognized providing agencies. Providing agencies (post-secondary institutions) received contributions toward the development and implementation of educational programs and resources or for research projects which had the confirmed support of local labour organizations. Contributions were made in accordance with identified financial need and in proportion to the total amount of funds made available for this purpose.

Each means of support for labour education gave rise to varying programs and structures and, as such, suggests that different indicators of success must be used in assessing the LEP and its various objectives. In addition, the resulting alternative programs and structures raises questions with respect to the integration of labour education activities in various sectors of the labour movement in Canada.

1.3 Labour Education Program Objectives

Many objectives are identified and emerge in any educational undertaking involving so many independent parties, both collective and individual. Some objectives are long-term in nature and some are more immediate. Objectives vary from time to time, event to event, organization to organization and participant to participant. It is the nature and intent of educational activities to assist individuals to acquire, not only new skills and knowledge, but also to gain fresh perspectives from which original objectives can and must be reinterpreted and redefined. The administrative means by which the Federal Government, through the Employment Relations Branch of Labour Canada, chose to provide support for the LEP favoured a maximum level of decentralized control and administration and encouraged a high level of participation and creativity in the interpretation of the general objectives of the program. If centralized bureaucratic administrative structures had been utilized, the interpretation of objectives would have been much narrower and more conventional.

This evaluation has been conducted against this background of constantly evolving objectives, a circumstance which is both desirable and frustrating. Learning is always cumulative in its effects; and programs, like individuals, tend to change and adjust. At the same time, the LEP involves public funds, government policies, and social consequences; and, as such, the public is entitled to know what activities have resulted from public support and to what degree these activities represent responsible, competent and imaginative attempts to achieve the general objectives articulated at the outset.

Educational activities tend to lead to unique difficulties in any attempt to establish objectives which can later be used to monitor the activities and assess progress. If objectives are defined with enough specificity to be quantifiable, then much of the self-determination and creativity which should exist in teacher-learner interactions may be lost. Current reseach supports the view that learning is most successful when a substantial degree of freedom exists for the cooperative determination, between teachers and learners, of methods, timing, objectives, specific content, and issues to be addressed. If objectives are stated too broadly, little or no guidance or direction is provided and no clear markers or criteria are suggested by which activities and progress can be assessed.

The Federal Government concluded, as a result of changes in the economy (e.g. increased levels of inflation) and in the area of labour relations (e.g. increased loss of working days due to unrest; increased acrimony between labour, management and government), that the collective bargaining system needed to be improved and extended. Among other things, this conclusion meant government acceptance, indeed encouragement, of a larger role for labour organizations in the management of the Canadian economy and participation of labour leaders in more complex and demanding social, political and economic activities both inside and outside of labour organizations.

Following the elimination of wage and price controls in 1976, a clear commitment emerged from the Federal Government in support of the provision of means by which leaders of labour organizations could acquire the skills, understanding and expertise necessary to fill new and demanding roles. The government accepted the fact that it was no longer possible for a member of a labour organization to learn the necessary skills and acquire the necessary knowledge merely by pursuing the traditional steps of organizational apprenticeship through which positions of leadership were once achieved. As is the case in most other areas of society, it was recognized that only organized, self-conscious interventions would allow for the rapid, precise and systematic opportunity to accomplish the necessary learning. It was further acknowledged that, because the learning required was inextricably bound up with the history and dynamics of the labour movement, the educational activities to support such learning would need to be under the direct conrol of the labour organizations themselves.

Finally, the objectives of the LEP must be understood in relation to the essence of labour organizations as democratic, political organizations controlled by their members. Any activity in which a labour organization engages, with whatever financial support, must be understood and accepted by the bulk of the membership. There are tensions within labour organizations which tend to affect the manner in which educational activities are conducted. Further, because the essential goal of learning programs is change, tensions arise around those activities which set out to publicly change the very individuals who make the decisions about the nature and existence of such activities.

From these factors which determine the nature of learning and educational activities and from the conclusions reached by the Federal Government, four principal, publicly-stated objectives for the LEP emerged. We must point out that these objectives were stated in many different forms, on many different occasions, and only rarely were all four stated together. These four objectives were:

(i) To improve the capacity of individual members of labour organizations to understand the nature of their unions, the Canadian labour movement, and their role as members of their communities. To improve the skills of members to enable them to fulfill the various specialized roles demanded of officers of labour organizations.

(ii) To improve the capacity of labour organizations to play larger roles in the society, and to contribute to economic and social development and stability.

(iii) To contribute to smoother industrial relations in Canada.

(iv) To improve the equity with respect to the share of different groups in the society in resources for education.

These statements are sufficiently global in nature to ensure and enhance participation in the LEP, a factor essential to its success. Presumably each organization or individual signing a contract, applying for a grant, bursary or contribution, or supporting the application for a bursary or contribution accepted these objectives. Each one was free, however, to interpret some or all of the objectives differently and each could advance different means for meeting them. In addition, the third objective tends to provoke a certain amount of controversy when different interest groups attempt to define criteria of success or failure. The definition of smoother industrial relations, more than any other stated goal, stimulates the inescapable ideological aspects of the entire enterprise. And yet the fact that there is controversy, even within the labour movement, on the nature of that definition suggests that the objective has merit and is open to some kind of meaningful analysis.

All educational enterprises involve objectives which are dramatically easier to state than to achieve or measure. Did someone learn something from any event stimulated by the enterprise? Did that learning, in any demonstrable way, contribute to any one or all of the stated objectives? Absolute proof is fugitive without clearly delineated before and after tests, and without carefully monitored control or comparison groups. Experience with both formal and informal educational enterprises and with decentralized undertakings, such as those under examination, suggests that in the absence of precise objectives with clearly defined indicators, definitive conclusions and generalizations may be very difficult or even impossible to obtain. This is another way of saying that the broad, flexible program goals of the LEP are not easily made the subject of rigorous, precise evaluation or research techniques.

1.4 Administration of the Labour Education Program

The inclusion of comments about Labour Canada was not stipulated in the original contract for evaluation. However, we found it impossible to complete the evaluation satisfactorily without reporting and analysing developments in Labour Canada which had occurred during the course of the LEP. Among the explicit recommendations, numbers 1 through 9 are expressly directed to matters which can be addressed only by Labour Canada. The investigators have interviewed members of the national staff of Labour Canada and visited representatives in each of the regional offices (see Appendix H).

In any program of the size of the LEP, there are literally hundreds of files and documents which one might consult in attempting to perform the type of evaluation we have used in this report. Our experiences with the personnel at Labour Canada have been gratifying and, at times, we have been overwhelmed with the degree to which they have anticipated our needs for complex summaries and detailed analyses. The carefully articulated and up-to-date system of information which was made available to us is itself worthy of note, given the small number of staff who have been assigned to the LEP from the outset.

In our study of the files, especially those related to the program of grants to independent labour organizations, we became aware of a paradoxical situation. On the one hand, Labour Canada was (and is) committed to allowing labour organizations to run their own show with respect to the design and management of their own educational endeavours. On the other hand, as a government ministry, Labour Canada has well-defined needs for information and for certain control over the money which it disperses. These two factors tend to create difficulties when recipients of funds fail to file detailed statements of expenditures which meet the expectations and needs of the Federal Government or change the nature or foci of programs after receiving funds. If Labour Canada insists on having all the information which it deems necessary for the administration of the LEP, then it can be accused of meddling in the affairs of labour organizations and of having reneged on its pledge to offer LEP funds on a no-strings basis. If Labour Canada does not insist on detailed information or fails to follow-up on shifts in the ways in which funds are being used, then external auditors, such as our research team, may cast a critical eye and some doubt on the management of the LEP. In general, individuals and labour organizations who have received funds have followed the regulations for filing information. There are some exceptions, but these are very few; and some of the initial difficulties have eased as labour educators have gained experience, confidence and skill in developing large-scale educational programs, writing funding proposals, and filing evaluation reports.

There were two or three cases in which funded projects were not carried out or were not completed and the funds were not returned to Labour Canada. In these cases, there did not appear to have been a concerted effort to recover these funds. It can probably be argued that to do so would cost far more than the amount that could be reclaimed and that the small staff available does not have the time or resources necessary to perform this function. The sums are indeed very small, but the principle of requiring every individual and labour organization to be fully accountable needs to be more clearly enunciated and should receive some reinforcement by a strenuous effort on the part of the Auditor General's Office in support of Labour Canada in these instances.

The numbers of staff members associated with the LEP in Labour Canada has been very small. Regionally, the LEP has been administered without any increase in staff. While such prudent economy on the part of the Ministry is to be applauded, it may be that it is now having a negative effect on the development of the program(s) in terms of quality, particularly with respect to the independent labour organizations.

In regional offices of Labour Canada, there appears to be mixed enthusiasm for and experience with administrative involvement in the LEP. In several cases, individuals who exhibited the most interest in the program from its inception have left their respective positions. With respect to the contractual agreement with the Canadian Labour Congress and the Canadian Conference of Teamsters there has not been a great deal for regional officers to do. Where it has been required, attendance at committee meetings, such as ARLEC in the Atlantic Region and the regional boards of the Labour Education and Studies Centres of the CLC, has been regular. All relationships which have developed between Labour Canada and the labour movement as a result of the LEP appear to have been positive.

Some problems at the regional offices have occurred with respect to grants to independent labour organizations. There is a wide divergence among offices in regard to information about the whereabouts or even the existence of small labour organizations. Few come under federal jurisdiction so that, in the past, there has been no other compelling reason for regional offices to know about them. In heavily populated and highly industrialized areas, effort expended to find and inform such organizations of the existence of financial support met with mixed success. Three provinces--British Columbia, New Brunswick, and Nova Scotia--have recently provided up-to-date directories of labour organizations, and the national list, on which our tables are based, was produced only after considerable and recent effort by the staff of Labour Canada. The imbalance in grants favouring the larger labour organizations (see Tables 3-3, 3-7 and 3-8) may be due, in part, to the difficulty of finding and informing the smaller organizations.

However, regional officers have faced an additional dilemma that has increased in intensity as the program has continued. The per capita formula on which the program for independent labour organizations is based precludes the exercise of qualitative judgments at either the regional or national levels. This fact alone may be the principle reason for the stability in numbers in the program staff. Regional offices report that less than 5% of their time has gone into processing the applications for the LEP during the four year period. Nevertheless, the formula, which at present pays 65 cents for the first 2,000 members and an average of 59 cents for additional members, cannot be said to maintain any base level of funding for any one organization. There is no minimum amount for very small organizations. Regional officers reported their embarassment at having to inform some small organizations, whose interest they had encouraged, that the total amount available for them would be less than one hundred dollars. Some small organizations, for example, university faculty associations, have alleviated the problem by pooling their resources through national workshops planned and implemented by national federations. That opportunity has not been open to all small organizations.

A further aspect of the dilemma posed by the per capita formula has occurred with respect to the apparent rigidity of the total amount of monies available for this section of the LEP. This is presumably a result of the reported scarcity of additional funds available during the four year period. Regional officers have continued to publicize the program, despite the dilemma, and applications have increased by 62% between year I and year IV (see Table 3-5). This increase has included a 12% increase between years I and II, 30% between years II and III and 12% between years III and IV. In the same time, the funds available have increased by only $23,000 or 9% between year I and year IV. This increase has included an increase of $12,000 or 5% between years I and II, a decrease of $16,000 or 6% between years II and III, and an increase of $27,000 or 10.5% between years III and IV. Extensive promotion has resulted in an increased number of applicants with the accompanying danger that every independent labour organization will get less and less each year.

Recommendation: Labour Canada should regularly and systematically assess the experience and opinions of the regional officers with respect to the functioning of the Labour Education Program. This assessment should be undertaken in order to increase the commitment of the regional staff to the LEP and to increase their understanding of what is expected of them in relation to the LEP. Staff members and

Regional officers should have opportunities to engage in educational activities designed to promote their own development, knowledge, and expertise.

The overall financial details of the Federal Government's provision of support for labour education through Labour Canada over the entire four years can be found in Table 3-1. The information, as presented, is in accord with the original intentions of the Federal Government to provide assistance, by contract, to large federated labour organizations over a five-year period. The indexed contracts were designed to provide the security of assured funds for a specific period of time with protection against the effects of inflation on the desired and inevitable growth of such programs. In return there was an expectation that the monies provided by the Federal Government would stimulate spending on education by the labour organizations in excess of the federal support. Evidence relating to this objective will be reported in separate sections on the CLC, the Teamsters, and the independent labour organizations.

The relationships between the Canadian Labour Congress, the Canadian Conference of Teamsters, and Labour Canada have have been determined by contract. The organizational responses of these groups are, therefore, a matter of internal policy which will be treated in individual sections. Other than attendance at board and educational committee meetings, Labour Canada has had little to do with these organizations except through the provision of funds and the annual auditing of expenditures.

The case is otherwise in regard to the independent labour organizations. Labour Canada requires each independent labour organization to file an annual request for funds stipulating how the money is to be spent on educational activities. Each organization receives only 75% of the grant until such time as a summary evaluation report on the educational activities actually conducted and associated expenditures is filed. These requirements lead to a different set of relationships and decisions, which after four years present some trends for analysis.

In terms of comparative equity with respect to the provision of public support for education of other interest groups in Canada (as stated in LEP objectives in Appendix B), no observations are possible. The information on which such comparisons might be made is not available. A fair comparison would be to compare the funds provided through the LEP with tax allowances, that is foregone taxes, allowed by the Federal Government to private organizations for management training. In terms of simple equity with respect to equalizing opportunities, the provision of over 11 million dollars during a four-year period, where no such financial assistance existed before, is prima facie evidence of the achievement of this goal.

However, a four-year assessment of the program indicates that some inequalities have developed with respect to the distribution of funds within the program. The indexing of the contractual agreements with the large federations, which has served to protect them against the effects of inflation, appears to have done so at the expense of other elements of the program. First, the Post-secondary program, cancelled in the second year, has not been renewed. Second, the share allotted to the Bursary program has declined somewhat, and that allotted to the independent labour organizations has declined by 4% over the four-year period. Third, in real terms, the latter two programs have had no additional protection against the effects of inflation.

Our analysis of the distribution of funds over the four year period indicate a clear imbalance. Table 3-2 is a summary of our estimates of the distribution of membership in labour organizations (derived from Table 3-3) and the proportional distribution of funds within the LEP (derived from Table 3-1), averaged over the four year period.

Table 3-2

Comparison of Memberships in and Funding to Various Labour Organizations

Labour Organization	% of Total Membership of Labour Organizations	% of Total LEP Funds Averaged Over 4 years	Discrepancy
Canadian Labour Congress (CLC)	67.3%	78.9%	+11.6
Canadian Conference of Teamsters	2.6%	2.7%	+ 0.1
Conference of National Trade Unions (CNTU)	6.0%	5.9%	- 0.1
Centrale des Sydicats Democratiques (CSD)	1.3%	0.9%	- 0.4
Independent Labour Organizations	22.8%	9.4%	-13.5
Bursarists and Post-secondary	---	2.2%	---

There is evidence of the advantages with respect to qualitative achievement associated with the provision of contracts. Indeed, the presence of indexed contracts would appear to be directly related to the LEP objective to distribute educational funds more equitably. Therefore, we are in no way implying that the solution to inequalities within the LEP lies in reducing the total amount of funds that have been made available to the federations. However, it seems apparent to us, in financial terms alone, that some means must be found to redress the inequalities now being experienced by the independent labour organizations.

Table 3-7 and 3-8 support the case further. No organizations with less than 100 members received any grants during the four-year period, despite the fact that nationally they represented 3,600 members and 28% of all independent labour organizations. Of those organizations with fewer than 1,000 members, only 45 out of a possible 194 organizations, or 23%, received grants. In each case the amount of money received was very small indeed. In the fourth year of the LEP, an independent labour organization had to have a minimum of 154 members to receive at least $100, a sum which could purchase, at most, three nights of lodging, meals for four days or 500 miles return travel for one person. It is only when the membership levels reach more than 2,500 persons that a reasonable balance (i.e., more than 60%) is achieved between numbers of organizations eligible for grants and successful applicants.

There is further evidence of inherent difficulties in the program in relation to the independent labour organizations, which is documented in Tables 3-11 through 3-15. These Tables report on the numbers of organizations which received grants for one, two, three or all four years of the program. In the Atlantic Region, 31% of all recipient organizations held grants for three or more years and received 80% of the monies available. The corresponding figures in the Great Lakes Region were 35% of recipient organizations and 61% of monies; in the Central Region were 50% and 87%; and in the Mountain Region were 26% and 76%. Several interpretations are possible, not the least of which is the likelihood that staff members in the Central Region made special efforts to find the eligible independent labour organizations at the start of the program.

If evidence could be found of higher quality of programs on the part of those recipients which have participated in the LEP for three or four years when compared to those which have participated for only one or two years, then an argument could be made that for those union organizations a condition akin to the existence of a contract, with its attendant advantages, was in operation. However, the absence of such definitive evidence would seem to indicate that, even with four years of repeated financial assistance, a special role is played by the insecurities associated with needing to apply each year and not knowing in advance if a grant would be forthcoming nor how much that grant would be worth. So far as can be determined, few new programs were undertaken, and federal assistance contributed mostly to enlarging existing programs. We cannot be sure of the weight which should be assigned to such additional factors as interest and imagination among those organizations which have not applied; the reliability of the present information system; the energy expended in the regional offices of Labour Canada; the existence in each independent labour organization of at least one individual who assumes responsibility for applying for grants, planning and implementing educational activities, and filing final evaluation forms; and so on. Clearly the size of the per capita formula is a mitigating factor--as the per capita grant increases, the number of applications would also increase, and the increased size of an individual grant would make the time devoted to completing the application and evaluation processes more worthwhile.

In reviewing the grant distribution on a regional basis, the figures presented in Table 3-6 show a comparison between regional distribution of independent labour organizations and of the grants to organizations; and distribution of regional membership in organizations and of the dollar value of grants. This table shows that the Saint Lawrence Region received more dollars than might be expected on the basis of membership distributions, while the Great Lakes Region received less; and that the Central Region received more grants than might be expected based on numbers of independent labour organizations while the Great Lakes Region received less. The discrepancy in the dollar amounts to the Great Lakes Region would have been greater if the very large grant to the Ontario Public Service Employees' Union (OPSEU) in year I had been excluded. In years II, III and IV, OPSEU came under the funding contract with the CLC because of its affiliation with the National Union of Provincial Government Employees (NUPGE). The lower-than-expected distribution of both numbers of grants and dollars to the Great Lakes Region is due, in part, to the facts that this region has a large number of very small independent labour organizations which are hard to locate and which are eligible for very small sums of money; and that two of the largest independent labour organizations in the region (i.e., the Federation of Women Teachers' Associations of Ontario and the Ontario Secondary School Teachers' Federation) did not apply for grants in any of the four years. Had either of these large organizations applied, the per capita grant change would have been reduced substantially in the third and fourth years.

Tables 3-9 and 3-10 and Figure 3-m show the distribution of independent labour organizations by sector and the distribution of grants and dollars to each sector in each region. Organizations in the health and government sectors generally fared better than organizations in other sectors, in that both received more grants and more dollars than might be expected on the basis of distribution of organizations and members. The education sector received more grants than might be expected on the basis of existing organizations, but fewer dollars than expected. The educational organizations which received grants tended to be very large federated organizations of school teachers (with the exception of the Great Lakes Region) and very small faculty associations. Therefore, while numbers of grants were high, the dollar value was less than expected. Those organizations in the health and government sectors which received grants tended to be large province-wide groups, which applied in each of the four years. Therefore, both numbers of grants and dollars were higher than might be expected.

The education, health and government sectors combined made up 53% of independent labour organizations and 81% of the membership, and received 83% of available grants and 92% of available dollars. Other sectors were under-represented in both grants and dollars received. This under-representation may be a reflection of the fact that the education, health and government sectors tend to have existing professional or continuing educational activities already in place, are skilled in applying for public funds, and have better information systems with respect to what monies are available

There is some indication that smaller labour organizations are increasing in number and are likely to continue to do so. If this is the case and since they are as much in need of financial assistance as labour organizations belonging to large federations, the present system for funding independent labour organizations should be altered in order to give them equity in the funding process.

Recommendation: Labour Canada should review the basis on which independent labour organizations are now funded. Consideration should be given to not only increasing the amount of funds available to the independent labour organizations, but also to establishing some minimum level for individual grants.

1.5 The National Advisory Council

It seems likely that the smaller independent labour organizations need assistance other than financial. They need access to the resources and techniques existing within the main stream of labour education. They also need assistance and sufficient information to enable them to pool their resources in order to improve the quality and quantity of their educational programs, bearing in mind that the per capita costs and grants must be kept within reasonable limits.

The original intent of the LEP was that such assistance would be provided to small labour organizations through post-secondary institutions. The cancellation of the Post-secondary segment of the LEP after the first year has severely restricted the development and pooling of such resources, although it did not entirely stop the growth of cooperative programs.

There are other indications that some relaxation of the no-strings policy and the automatic funding of applications from independent labour organizations should be considered by Labour Canada. The restoration of the Advisory Committee, or the appointment of a Labour Education Commissioner might be one means of providing the qualitative assistance needed by small independent labour organizations.

Throughout the background papers prepared for and by the Federal Government in anticipation of the launching of the LEP, considerable attention is paid to the need for a National Advisory Council in the overall development and direction of the Program. The experimental nature of the Program and the numerous and diverse organizational interests to be served suggested the need for a representational group of these different constitutencies which would provide continuing advice and information, inform potential applicants and regularly assess and report on the successes and failures of the Program.

Accordingly, a National Advisory Council was formed in 1977 with the following guidelines:

a) to advise the Minister of Labour with respect to the needs, emphases, directions, and other matters relating to labour education policy in Canada;

b) to advise and recommend appropriate subjects for study and research with respect to the above;

c) to advise and assist with the assessment and evaluation of programs and projects;

d) to advise on the distribution of grants and contributions to labour organizations for programs and projects other than those under the direction of the Canadian Labour Congress;

e) to provide links to related areas such as Workers' Education, Vocational Training, Occupational Health and Safety, General Adult Education, and so on; and

f) from time to time, to plan and conduct national conferences on labour education.

The Advisory Council met twice, once in December 1977 and once in February 1978. The Council was discontinued during the second year of the Program and at the same time as post-secondary contributions ceased. The decision to terminate post-secondary contributions was one of the reasons given for eliminating the Council. The total cost of the two Council meetings, including travel and per diem expenses of $100 per person, was approximately $10,000.

A review of the minutes of the two meetings suggests that the Advisory Council had accepted the broad responsibilities outlined in the guidelines. The educational activities of the federated labour organizations which had received contracts were explicitly excluded in the guidelines. However, the guidelines imply that the Council was to be responsible for advising on and supervising those sections of the LEP which awarded grants to independent labour organizations, contributions to post-secondary insititutions, and bursaries to individuals. In addition, the guidelines suggest other responsibilities related to the provision of advice on the overall design of the LEP, to the collection and dissemination of information, and to the coordination of the entire Program. The two meetings of the Council dealt mainly with post-secondary contributions and bursary grants. However, other more general business was also discusssed and the Employment Relations Branch of Labour Canada supplied special advice and personnel to aid in the accomplishment of these tasks.

The decision to eliminate the Post-secondary Program was taken by Labour Canada as a result of a demand from Treasury Board for a major reduction in spending on the total Program. Alternatives appear to have been few. However, there is no evidence that any consideration was given to consulting the Advisory Council about appropriate cuts in spending despite the guidelines (particularly "a" and "c"). The resulting response, or lack of response, by the labour movement as a whole to the elimination of the Post-secondary Program suggests that the decision might have been the same had the Advisory Council been consulted; but to have done so would, in our opinion, have strengthened the commitment of Council members to the remaining components of the LEP.

The decisions to eliminate the Post-secondary Program and to maintain the program of grants to independent labour organizations on a yearly formula basis requiring no qualitative decisions by Labour Canada, also eliminated the functions of the Advisory Council designated by guideline "d". There remained, however, five responsibilities from the original guidelines. The saving of approximately $10,000 in the second year, as well as in succeeding years, of the LEP seem hardly more than token in comparison to the Advisory Council's ability to contribute to the need to maintain the focus of the Program, to provide liaison among various constituencies, and to contribute to the integration and assessment of such a diffuse and experimental federal project. By the fourth year of the Program, we found a widespread lack of information regarding the extent and nature of the LEP which we believe has reduced the overall effectiveness of the Program and could have been allieviated by an effective Advisory Council.

We cannot avoid the conclusion that the manner in which the National Advisory Council was handled represents one example of the ambivalence within the Federal Government with respect to the seeking of qualified and systematic advice (see for example People in Action, A Report of the Council on Voluntary Action, Secretary of State, 1977). Since there appears to have been little objection to the termination of the Advisory Council from the outside the Federal Government, we must conclude that such ambivalence is not confined solely to the governmental sector of society.

Recommendation: Labour Canada should consider the provision of qualitative assistance, as well as financial assistance, to the small independent labour organizations. A reconstituted Advisory Council and/or a Labour Education Commissioner could perform such a role.

Recommendation: The original agreement with the federations called for an external evaluation of the programs at the end of the second and fourth years. These evaluations have been completed with evidence of benefit to all parties. At the same time there is evidence of the development of procedures and relevant activity for evaluations being conducted by the federations themselves. Labour Canada should now begin discussions with the federations and with the independent labour organizations with respect to basing the future evaluations on the information collecting activities now being undertaken by the various labour organizations.

TABLE 3-3

Distribution of Labour Organizations by Size and Affiliation
For 1980 - 1981

	Canadian Labour Congress Affiliates & Directly Chartered Unions		Independent Labour Organizations		Other Organizations Quebec Federations Canadian Teamsters		TOTALS	
Membership Range	Numbers of Unions	Numbers of Members	Numbers of Unions	Numbers of Members	Numbers of Federations	Numbers of Members	Numbers of Unions	Numbers of Members
Less than 100	75	3,200	85	4,000			160	7,200
100 - 199	16	2,800	55	7,700			71	10,500
200 - 499	8	2,600	59	19,200			67	21,800
500 - 999	6	4,200	43	32,200			49	36,400
1,000 - 2,499	13	21,800	40	66,100			53	87,900
2,500 - 4,999	14	50,400	21	72,500			35	122,900
5,000 - 9,999	16	118,000	20	145,300			36	263,300
10,000 - 14,999	9	112,000	6	78,400			15	190,400
15,000 - 19,999	6	103,000	4	72,800			10	175,800
20,000 - 29,999	7	161,800	3	78,600			10	240,400
30,000 - 39,999	7	241,000	3	100,400			10	341,400
40,000 - 49,999	-	-----	1	45,000	1	44,500(a)	2	89,500
50,000 - 99,999	7	457,800	1	81,000	1	92,000(b)	9	630,800
100,000 or more	6	1,091,400	-	-----	1	210,400(c)	7	1,301,800
TOTALS	190	2,370,000	341	803,200	3	346,900	534	3,520,100
% of Totals	35.6%	67.3%	63.8%	22.8%	(a) CSD (b) Teamsters (c) CNTU	1.3% 2.6% 6.0%	100%	100%

Sources: Labour Canada, Directory of Labour Organizations in Canada: 1981. Ottawa: Ministry of Supply & Services, 1981

Canadian Labour Congress, Report on membership of standing affiliates, 1980

Labour Canada, Labour Education Program, figures provided by H. Jacks.

Notes: (a) Centrale des Syndicats Democratiques (CSD). 410 unions with total membership of 44,500

(b) Canadian Conference of Teamsters. 1981 membership 92,000

(c) Confederation des Syndicats Nationaux (CNTU). 1,400 affiliates and 3 directly chartered unions with total membership of 210,400.

Other unions affiliated to other federations, such as the Confederation of Canadian Unions (CCU) and the American Federation of Labour and Congress of Industrial Organizations (ALF/CIO), were included in the Independent Unions.

TABLE 3-4

INDEPENDENT LABOUR ORGANIZATIONS

Total Value of Grants by Regions and Years

Region	Year I 1977-78	Year II 1978-79	Year III 1979-80	Year IV 1980-81	Regional Totals	% of National Total
Atlantic	$ 20,378	$ 19,942	$ 16,634	$ 11,106	$ 68,060	6.2%
Saint Lawrence	77,524	123,040	113,956	123,745	438,265	40.0%
Great Lakes	100,505	57,782	75,103	63,752	297,142	27.2%
Central	28,884	15,579	17,620	19,907	81,990	7.5%
Mountain	38,578	61,768	38,445	70,652	209,443	19.1%
NATIONAL TOTALS	$265,869	$278,111	$261,758	$289,162	$1,094,900	100%

Note: This table is the only one showing grants to the Saint Lawrence Region. In succeeding tables, $ values for grants are provided to the nearest hundreds and for the Atlantic, Great Lakes, Central, and Mountain Regions only.

TABLE 3-5

Distribution of Grants by Numbers of Organizations, Years and Regions.

Region	Year I 1977-78	Year II 1978-79	Year III 1979-80	Year IV 1980-81	Regional Totals	% of National Total
Atlantic	7	5	12	9	33	15.1%
Saint Lawrence	12	14	13	15	54	24.8%
Great Lakes	9	12	18	17	56	25.7%
Central	5	6	8	11	30	13.8%
Mountain	9	10	10	16	45	20.6%
NATIONAL TOTALS	42	47	61	68	218	100%

TABLE 3-6

INDEPENDENT LABOUR ORGANIZATIONS

Comparison of Grant Distribution by Regions
(Using average over four years 1977-81)

	ATLANTIC REGION	SAINT LAWRENCE REGION	GREAT LAKES REGION	CENTRAL REGION	MOUNTAIN REGION
% distribution of memberships in independent labour organizations 100% = 802,200 (a)	5.9%	33.3%	32.9%	6.0%	21.9%
% distribution of total $ value of grants (based on membership) (b) 100% = $1,094,900	6.2%	40.0%	27.2%	7.5%	19.1%
% distribution of independent labour organizations 100% = 341 (c)	13.2%	22.0%	32.8%	8.5%	23.5%
% distribution of total numbers of financial grants to independent labour organizations. 100% = 218 (d)	15.1%	24.8%	25.7%	13.8%	20.7%

Notes: (a) Refer to figures provided in Tables 3-3 and 3-7

(b) Refer to figures provided in Table 3-4

(c) Refer to figures provided in Tables 3-3 and 3-7

(d) Refer to figures provided in Table 3-5

TABLE 3-7

INDEPENDENT LABOUR ORGANIZATIONS

Distribution of Membership by Regions and Size of Organizations
for 1980 (excluding Saint Lawrence Region)

Size of union	Atlantic Region		Great Lakes Region		Central	Region	Mountain Region		TOTALS	
	# of Unions	# of Members	# of Unions	# of Members	# of Unions	# of Members	# of Unions	# of Members	# of Unions	# of Members
Less than 100	17	900	29	1,500	10	500	18	700	74	3,600
100 - 199	9	1,300	16	2,300	6	1,000	16	2,200	47	6,800
200 - 499	8	2,700	21	6,800	3	1,100	12	3,900	44	14,500
500 - 999	3	2,200	16	12,500	3	2,800	7	5,300	29	22,800
1,000 - 2,499	3	4,900	12	21,000	1	1,100	13	21,000	29	48,000
2,500 - 4,999	2	7,400	5	16,400	2	7,500	7	22,900	16	54,200
5,000 - 9,999	2	16,000	6	38,800	2	11,000	3	22,200	13	88,100
10,000 - 14,999	1	11,500	1	14,700	2	23,000	1	14,500	5	63,700
15,000 - 19,999	-	-----	3	54,000	-	-----	-	----	3	54,000
20,000 - 29,999	-	-----	1	27,800	-	-----	2	50,800	3	78,600
30,000 - 39,999	-	-----	2	68,100	-	-----	1	32,300	3	100,400
40,000 - 49,999	-	-----	-	-----	-	-----	-	-----	-	-----
50,000 - 99,999	-	-----	-	-----	-	-----	-	-----	-	-----
100,000 or more	-	-----	-	-----	-	-----	-	-----	-	-----
TOTALS	45	46,900	112	263,900	29	48,100	80	175,800	266	534,700
% Distribution of Organizations	17%		42%		11%		30%		100%	
% Distribution of Membership		9%		49%		9%		33%		100%

Note: If the figures for the Saint Lawrence Region had been included, Quebec independent labour organizations would have totalled 22% of organizations and 33% of memberships, with other regions being adjusted downward accordingly.

TABLE 3-8

INDEPENDENT LABOUR ORGANIZATIONS

Distribution of Financial Grants by Regions and Size of Labour Organizations

For Years I - IV (1977-81), showing numbers of grants, numbers of individual organizations receiving grants, and total $ value of grants.

Size of Organization	ATLANTIC # grants/# unions $ value of grants	GREAT LAKES # grants/# unions $ value of grants	CENTRAL # grants/# unions $ value of grants	MOUNTAIN # grants/# unions $ value of grants	TOTALS # grants/# unions $ value of grants	COMPARISONS # receiving: # eligible(b)
Less than 100	-----	-----	-----	-----	-----	0:74
100 - 199	3/ 3 $ 300	2/ 1 $ 200	4/ 2 $ 500	2/ 2 $ 200	11/ 8 $ 1,200	8:47
200 - 499	10/ 6 $ 2,300	4/ 3 $ 700	2/ 1 $ 500	3/ 1 $ 900	19/11 $ 4,400	11:44
500 - 999	-----	7/ 4 $ 3,600	5/ 3 $ 3,000	4/ 4 $ 2,200	16/11 $ 8,800	11:29
1,000 - 2,499	7/ 2 $ 8,700	12/ 5 $ 13,700	3/ 1 $ 2,000	9/ 7 $ 8,500	31/15 $ 32,900	15:29
2,500 - 4,999	4/ 2 $ 7,300	7/ 3 $ 14,900	4/ 1 $ 7,900	10/ 6 $ 22,800	25/11 $ 52,900	11:16
5,000 - 9,999	5/ 2 $ 25,300	9/ 4 $ 42,600	7/ 2 $ 26,700	5/ 3 $ 17,800	26/11 $ 112,400	11:13
10,000 - 14,999	4/ 1 $ 24,100	2/ 1 $ 17,400	5/ 2 $ 41,200	4/ 1 $ 36,200	15/ 5 $ 118,900	5: 5
15,000 - 19,999	-----	8/ 3 $ 90,300	-----	-----	8/ 3 $ 90,300	3: 3
20,000 - 29,999	-----	4/ 1 $ 68,800	-----	5/ 2 $ 67,000	9/ 3 $ 135,800	3: 3
30,000 - 39,999	-----	-----	-----	3/ 1 $ 53,800	3/ 1 $ 53,800	1: 3
40,000 - 49,999	-----	-----	-----	-----	-----	
50,000 - 99,999	-----	1/ 1 $ 45,000 (a)	-----	-----	1/ 1 $ 45,000	
100,000 or more	-----	-----	-----	-----	-----	
TOTALS	33/16 $ 68,000	56/26 $ 297,200	30/12 $ 81,800	45/27 $ 209,400	164/81 $ 656,400	81:266

Note: (a) This grant went to the Ontario Public Service Employees' Union (OPSEU) in 1977-78. OPSEU later came under the granting formula for the Canadian Labour Congress.

(b) Compare to figures provided in Table 3-6.

TABLE 3-9

INDEPENDENT LABOUR ORGANIZATIONS

Distribution of Membership by Regions and Industrial Sectors for 1980

Industrial Sector	ATLANTIC		GREAT LAKES		CENTRAL		MOUNTAIN		TOTALS	
	# of Unions	# of Members	# of Unions	# of Members	# of Unions	# of Members	# of Unions	# of Members	# of Unions	# of Members
Primary	1	100	3	3,200	2	100	8	10,900	14	14,300
Manufacturing	5	2,000	40	13,000	6	1,400	6	6,900	57	23,300
Construction	-	----	1	1,700	-	----	2	2,900	3	4,600
Trades	-	----	7	3,200	2	5,200	8	4,600	17	13,000
Transportation	2	100	5	10,600	-	----	3	800	10	11,500
Utilities	-	----	-	----	-	----	2	1,900	2	1,900
Communications	2	1,000	2	9,000	-	----	-	----	4	10,000
Finances	-	----	-	----	-	----	-	----	-	-----
Government	6	5,600	11	40,000	5	800	11	8,500	33	54,900
Education	22	32,400	26	137,900	9	26,200	25	72,700	82	269,200
Health	7	6,200	4	28,400	5	14,400	11	62,300	27	111,300
Services	-	----	10	5,900	-	----	3	1,300	13	7,200
Other	-	----	3	11,000	-	----	1	3,000	4	14,000
TOTALS	45	47,400	112	263,900	29	48,100	80	175,800	266	535,200

Note: Saint Lawrence Region (Quebec) figures not included in these totals

TABLE 3-10

INDEPENDENT LABOUR ORGANIZATIONS

Distribution of Financial Grants by Regions and Industrial Sectors

For Years I-IV (1977-81), showing numbers of grants, numbers of
individual organizations receiving grants, and $ value of grants

Industrial Sector	ATLANTIC # grants/# unions $ value of grants	GREAT LAKES # grants/# unions $ value of grants	CENTRAL # grants/# unions $ value of grants	MOUNTAIN # grants/# unions $ value of grants	TOTALS # grants/# unions $ value of grants	COMPARISONS # receiving: # eligible (a)
Primary	-----	-----	-----	-----	-----	0:14
Manufacturing	1/ 1 $ 100	7/ 3 $ 6,000	1/ 1 $ 600	3/ 3 $ 5,900	12/ 8 $ 12,600	8:57
Construction	-----	-----	-----	-----	-----	0: 3
Trades	-----	-----	3/ 1 $ 11,000	-----	3/ 1 $ 11,000	1:17
Transportation	-----	6/ 3 $ 15,800	-----	1/ 1 $ 100	7/ 4 $ 15,900	4:10
Utilities	-----	-----	-----	-----	-----	0: 2
Communications	-----	1/ 1 $ 7,200	-----	-----	1/ 1 $ 7,200	1: 4
Finances	-----	-----	-----	-----	-----	0: 0
Government	-----	17/ 7 $ 142,200	-----	11/ 4 $ 13,300	28/11 $ 155,500	11:33
Education	19/ 9 $ 53,800	16/ 9 $ 49,200	17/ 7 $ 46,100	13/10 $ 84,900	65/35 $ 234,000	35:82
Health	13/ 6 $ 14,100	5/ 2 $ 68,900	9/ 3 $ 24,100	16/ 8 $ 103,600	43/19 $ 210,700	19:27
Services	-----	-----	-----	1/ 1 $ 1,600	1/ 1 $ 1,600	1:13
Other	-----	4/ 1 $ 7,900	-----	-----	4/ 1 $ 7,900	1: 4
TOTALS	33/16 $ 68,000	56/26 $ 297,200	30/12 $ 81,800	45/27 $ 209,400	164/81 $ 656,400	81:266

Note: (a) Compare to figures provided in Table 3-8.

TABLE 3-11

INDEPENDENT LABOUR ORGANIZATIONS

Grants to Independent Labour Organizations by Numbers of Years

NATIONAL TOTALS

Numbers of Years (X)	Numbers of Organizations receiving grants for X years	← TOTAL $ AMOUNT OF GRANTS → Year I 1977-78	Year II 1978-79	Year III 1979-80	Year IV 1980-81	TOTALS	COMMENTS
4 years Sequential	11 unions 44 grants	$ 75,100	$ 62,600	$ 57,500	$ 55,900	$ 251,100	13.6% of unions awarded grants received 26.8% of total awards and 38.3% of total monies
3 years Sequential and/or Intermittent	17 unions 51 grants	25,300	67,500	54,100	69,100	216,000	21.0% of unions awarded grants received 31.1% of total awards and 32.9% of total monies
2 years Sequential and/or Intermittent	16 unions 32 grants	17,600	16,700	28,300	31,100	93,700	19.7% of unions awarded grants received 19.5% of grants available and 14.3% of total monies
1 year	37 unions 37 grants	70,500	8,200	7,800	9,100	95,600	45.7% of unions awarded grants received 22.6% of grants available and 14.5% of total monies
TOTALS	81 unions 164 grants	$ 188,500	$ 155,000	$ 147,700	$ 165,200	$ 656,400	

Note: Totals exclude grants awarded to independent labour organizations in the Saint Lawrence Region.

TABLE 3-12

INDEPENDENT LABOUR ORGANIZATIONS

Grants to Independent Labour Organizations by Numbers of Years

ATLANTIC REGION

Numbers of Years "X"	Numbers of Organizations receiving grants for "X" years	← TOTAL $ VALUE OF GRANTS →				
		Year I 1977-78	Year II 1978-79	Year III 1979-80	Year IV 1980-81	REGIONAL TOTALS
4 years Sequential	3 unions 12 grants	$ 16,900	$ 13,900	$ 12,600	$ 7,400	$ 50,800
3 years Sequential and/or Intermittent	2 unions 6 grants	1,500	-----	1,200	1,200	3,900
2 years Sequential and/or Intermittent	4 unions 8 grants	1,800	1,800	2,100	2,400	8,100
1 year	7 unions 7 grants	200	4,200	700	100	5,200
TOTALS	16 unions 33 grants	$ 20,400	$ 19,900	$ 16,600	$ 11,100	$ 68,000

TABLE 3-13

INDEPENDENT LABOUR ORGANIZATIONS

Grants to Independent Labour Organizations by Numbers of Years

GREAT LAKES REGION

Numbers of Years "X"	Numbers of Organizations receiving grants for "X" years	← TOTAL $ VALUE OF GRANTS → Year I 1977-78	Year II 1978-79	Year III 1979-80	Year IV 1980-81	REGIONAL TOTALS
4 years Sequential	3 unions 12 grants	$ 29,000	$ 23,900	$ 21,600	$ 23,800	$ 98,300
3 years Sequential and/or Intermittent	6 unions 18 grants	1,400	28,400	26,500	27,600	83,900
2 years Sequential and/or Intermittent	9 unions 18 grants	15,800	5,500	23,300	11,700	58,300
1 year	8 unions 8 grants	54,300	-----	3,700	700	58,700
TOTALS	26 unions 56 grants	$ 100,500	$ 57,800	$ 75,100	$ 63,800	$ 297,200

TABLE 3-14

INDEPENDENT LABOUR ORGANIZATIONS

Grants to Independent Labour Organizations by Numbers of Years

CENTRAL REGION

Numbers of Years "X"	Numbers of Organizations receiving grants for "X" years	← TOTAL $ VALUE OF GRANTS →				
		Year I 1977-78	Year II 1978-79	Year III 1979-80	Year IV 1980-81	REGIONAL TOTALS
4 years Sequential	3 unions 12 grants	$ 15,500	$ 14,300	$ 12,800	$ 13,600	$ 56,200
3 years Sequential and/or Intermittent	4 unions 12 grants	4,800	1,300	4,500	4,500	15,100
2 years Sequential and/or Intermittent	1 union 2 grants	-----	-----	300	300	600
1 year	4 unions 4 grants	8,700	-----	-----	1,200	9,900
TOTALS	12 unions 30 grants	$ 29,000	$ 15,600	$ 17,600	$ 19,600	$ 81,800

TABLE 3-15

INDEPENDENT LABOUR ORGANIZATIONS

Grants to Independent Labour Organizations by Numbers of Years

MOUNTAIN REGION

Numbers of Years "X"	Numbers of Organizations receiving grants for "X" years	← TOTAL $ VALUE OF GRANTS →				
		Year I 1977-78	Year II 1978-79	Year III 1979-80	Year IV 1980-81	REGIONAL TOTALS
4 years Sequential	2 unions 8 grants	$ 13,700	$ 10,500	$ 10,500	$ 11,100	$ 45,800
3 years Sequential and/or Intermittent	5 unions 15 grants	17,600	37,800	21,900	35,800	113,100
2 years Sequential and/or Intermittent	2 unions 4 grants	-----	9,400	2,600	16,700	28,700
1 year	18 unions 18 grants	7,300	4,000	3,400	7,100	21,800
TOTALS	27 unions 45 grants	$ 38,600	$ 61,700	$ 38,400	$ 70,700	$ 209,400

TABLE 3-16

INDEPENDENT LABOUR ORGANIZATIONS

Expenditures Reported by Independent Labour Organizations by Regions and Years

Year I: 1977-78

EXPENDITURE ITEMS REPORTED (a)	ATLANTIC REGION	GREAT LAKES REGION	CENTRAL REGION	MOUNTAIN REGION	TOTALS
		(Break-down not available)			
TOTAL EXPENDITURES REPORTED	$ 31,919	$ 324,774	$ 56,410	$ 23,454	$ 436,557
TOTAL GRANTS RECEIVED	$ 20,378	$ 100,505	$ 28,884	$ 38,578	$ 188,345

Year II: 1978-79

EXPENDITURE ITEMS REPORTED (a)	ATLANTIC REGION	GREAT LAKES REGION	CENTRAL REGION	MOUNTAIN REGION	TOTALS
Administration	13.1%	16.0%	8.0%	6.5%	11.3%
Educational Material	0.6	29.9	1.8	34.7	23.0
Instructors & Consultants	---	6.7	1.9	14.1	7.4
Student Wages & Benefits	21.3	15.5	14.5	4.2	12.5
Training & Related Expenses	2.5	5.3	---	0.1	2.4
Travel, Meals & Lodging	62.5	26.6	73.8	40.4	43.4
TOTAL EXPENDITURES REPORTED	$ 46,472	$ 127,626	$ 51,818	$ 109,052	$ 334,968
TOTAL GRANTS RECEIVED	$ 19,942	$ 57,782	$ 15,579	$ 61,768	$ 155,071

Note: (a) Categories used are specified in Appendix

TABLE 3-16 (continued)

Expenditures Reported by Independent Labour Organizations by Regions and Years

Year III: 1979-80

EXPENDITURE ITEMS REPORTED	ATLANTIC REGION	GREAT LAKES REGION	CENTRAL REGION	MOUNTAIN REGION	TOTALS
Administration	5.5%	10.1%	1.3%	12.4%	7.9%
Educational Material	1.4	21.0	37.7	0.6	17.6
Instructors & Consultants	1.8	12.9	1.5	17.8	9.4
Student Wages & Benefits	24.6	9.1	8.2	20.0	13.4
Training & Related Expenses	---	0.3	0.1	6.1	1.2
Travel, Meals & Lodging	66.7	46.6	51.2	43.1	50.5
TOTAL EXPENDITURES REPORTED	$ 72,975	$ 188,338	$ 85,646	$ 67,200	$ 414,159
TOTAL GRANTS RECEIVED	$ 16,634	$ 75,103	$ 17,620	$ 38,445	$ 147,802

Year IV: 1980-81

EXPENDITURE ITEMS REPORTED	ATLANTIC REGION	GREAT LAKES REGION	CENTRAL REGION	MOUNTAIN REGION	TOTALS
Administration	0.4%	34.7%	1.4%	11.1%	14.9%
Educational Material	1.5	4.6	26.3	0.5	5.4
Instructors & Consultants	1.3	17.1	1.3	5.3	7.5
Student Wages & Benefits	26.1	9.1	9.5	47.6	28.5
Training & Related Expenses	8.0	0.4	0.3	1.6	2.0
Travel, Meals & Lodging	62.7	34.1	61.2	33.9	41.7
TOTAL EXPENDITURES REPORTED	$ 82,529	$ 171,806	$ 86,710	$ 272,364	$ 613,409
TOTAL GRANTS RECEIVED	$ 11,106	$ 63,752	$ 19,907	$ 70,652	$ 165,417

Section 2: The Independent Labour Organizations

2.1 Background

The results of individual learning experiences and case studies of selected independent labour organizations have been reported in Chapters 1 and 2. This chapter will provide information on the overall activities and expenditures of the independent labour organizations. These activities and expenditures lie outside the realm of decision-making by Labour Canada since no qualitative judgment is exercised in making grants and there is no record of any applicant having been refused a grant except, infrequently, on procedural grounds. This segment reflects only on decisions made by the labour organizations themselves including, at least by inference, the decision of whether or not to apply for assistance.

Table 3-3 indicates that in 1980-81, the sector of the labour movement which we are referring to as the independent labour organizations was made up of 341 organizations, or nearly two-thirds of all labour organizations in Canada. This sector represented 802,200 members or 23% of all members of labour organizations. There is some reason to believe that the numbers of these organizations, especially the smaller ones, have increased in the past five years and will continue to do so. Leaving aside the impact and consequences of the recent split between the Canadian Labour Congress and organizations in the Building Trades, there is evidence of considerable ferment, of new alliances and realliances, taking place regularly within the ranks of organized workers. For example, one of the independent labour organizations selected for detailed review in this report (Kingston [Ontario] Independent Nylon Workers) was, until recently, part of the United Mine Workers of America. It has proved to be remarkably difficult to obtain accurate figures and information about the entire spectrum of independent labour organizations, which suggests a considerable degree of change in their numbers and identity.

Since each organization has both similar and dissimilar educational needs in comparison with every other organization, and each is a potential applicant, the per capita educational costs in this sector could be very high. In the four-year period under review, independent labour organizations received $1,094,900 or 9.4% of the total funds available (see Table 3-1). While the number of recipient organizations increased over four years from 42 to 68, an increase of 62%, the funds increased only $23,293 or 9%. This discrepancy resulted in a drop in the per capita grant from $.85 per member in year 1 to $.65 for the first 2,000 members and approximately $.59 for additional members in year IV. In the first four years of the Program, exclusive of the Saint Lawrence Region and of the grant to OPSEU in 1977-78, 80 independent labour organizations representing 365,600 members, received 163 grants amounting to $611,400.

In the fourth year of the program, the independent labour organizations' share of the LEP funds was $.36 per member (based on total national membership figures and distribution of grants to all five regions). However, only 68 independent labour organizations or 20% of those eligible applied for and received funds in the fourth year of the program. These organizations represented 59% of the total membership. The grants they received amounted to approximately $.61 per member. The labour organizations themselves added $2.70 for every

$1.00 received from the Federal Government for educational activities (Figure 3-b).

A comparison of the numbers of participants in educational activities within various independent labour organizations and the numbers of members in recipient organizations is provided in Figure 3-c. This comparison shows that participation rates in educational activities within the recipient organizations was approximately 2.4%. These figures are somewhat lower than those provided by Labour Canada which sometimes includes, as individual participants, all members of a labour organization who receive regular publications from the organization. It was our opinion that such mailings did not constitute participation in an educational event and we adjusted the participation figures accordingly.

For the larger organizations, where the per capita formula provides for a substantial sum of money, annual applications prove to be a decided advantage. One national association, the Canadian Association of University Teachers, has effectively coordinated applications from individual faculty associations as a basis for national workshops. Such evidence of growth and improvisation is by no means uniform across the recipient organizations. Participation of individuals has decreased, numbers of projects have increased, and the ratio of organizational expenditure on education to federal dollars has doubled in the four-year period (see Figure 3-b).

The statistics on independent labour organizations, when compared to those provided in Figures 3-p and 3-v for the Teamsters and CLC respectively, show different patterns of growth. These differences must be the result of the per capita formula by which grants to these organizations are calculated. We have already pointed out that the recipients of grants to independent labour organizations have often been among the larger organizations in the health, educational and government sectors.

There appears to be a minimum level of financial support below which federal assistance is ineffectual. Regional officers of Labour Canada reported that several labour organizations did not bother to apply for a grant when they discovered that the grant to which they were entitled was less than $50. In at least one case the organization attempted to apply for bursary money in the hopes that they would receive more than the $35 allowed by the per capita formula.

Among organizations which have received assistance for the full four years, we could find no impressive evidence that their educational activities would cease if the federal funds were no longer available. In many cases federal funds merely allowed the organization to defray costs for programs which were already fully operational. The inescapable conclusion is that information about the funds, encouragement and assistance in the application procedures, and the amount of the initial grant must be sufficient to stimulate the processes of applying for funding and of completing the evaluation necessary for final payment.

Recommendation: If Labour Canada wishes to achieve a greater degree of equity with respect to the provision of financial assistance to independent labour organizations, it must review the system by which information and funds are made available: that is, a minimum grant should be instituted for each independent labour organization in place of the current system of imposing a maximum limit on the total available and then dividing this amount on a strict per capita basis among applicants.

2.2 Participation

Figure 3-c indicates that over the four-year period, approximately 25,100 registrants took part in the programs provided by the independent labour organizations. We have no information which would enable us to detect the number of repeaters among the registrants. Any conclusion regarding the numbers of members being served by educational activities must take into consideration that participation is voluntary, and that, while the use of working days and the availability of wage recovery has been increasing steadily as evidenced by increases in expenditures on student expenses (see Table 3-16), members must often use their own time to attend. We noted in Chapter 2 that only 5% of individuals interviewed in the Independent sample paid for part or all of the costs of participation themselves.

Participants have been drawn largely from among elected officials as shown in Figure 3-d. In addition, there has been a small but steady increase in participation by regional officers and employed staff and decreases in participation by shop stewards and general members. Figure 3-e indicates a steady increase in courses and a decrease in conferences and workshops. Figure 3-f shows an increase in events of 3 to 5 days duration, although the two-day event remains predominant. Data on whether educational activities took place on workdays or at other times was available for years 1 and 11 only (see

Figure 3-g). However, the general increase in expenditures on student wages over years II, III and IV (see Table 3-16) suggest that more activities are taking place during working hours.

The increase in courses and in slightly longer events suggests the development of predictable educational phenomena. Initial exposure to educational activities tends to arouse the interest of a relatively small number of people to the extent that they may wish to participate in similar events with increasing frequency and to be exposed to more than one topic area. This assumption is borne out by the fact that first-attenders, as reported in Chapter 2 (Table 2-1), tended to participate at the invitation of the executive of the organization, while repeaters tended to participate to further their own education or their role in the union. This tendency for a small number of people to make use of a greater proportion of resources for learning is apparent throughout labour education activities, as it is throughout the general society. Any organization, as any society, must struggle with the necessary balance between the development of a small and highly-educated group of individuals and the attraction of the majority to some form of learning or education. The longer the programs are available, the more intense the struggle becomes.

2.3 Resource Development

The small number of publications and media productions is perhaps reflective of the general circumstances of most independent labour organizations (see Figure 3-1). The development of materials takes time and resources away from the more immediate need of reaching the maximum number of people. Materials from two of these organizations are discussed in Chapter 5. In general the quality of the print media varies from good to excellent while the quality of audio-visual media is adequate. Several independent labour organizations have reported that they are working in cooperation with post-secondary institutions in the development and use of educational media. For example, the Canadian Steelworkers have been assisted in media production through cooperative efforts with Niagara College in Welland.

Nevertheless, we expect that there is some repetition in the materials which have been developed and we believe that there would be a clear advantage in the sharing of resources and materials among the independent labour organizations, at least within each region or province.

Recommendation: Independent labour organizations should be encouraged, with the assistance of Labour Canada, to share educational resources where common interests and concerns exist.

2.4 Programs

Figures 3-h and 3-i represent the range and frequency of program topics and the stated educational goals of the independent labour organizations, taken collectively for four regions.

The substantial growth in training and education programs, which is also found among the contract groups, is evidence of organizational attempts to use limited funds to multiply effects. By training people who can then train others, the organization can develop a cadre of individuals committed to and skilled in forms of facilitating learning and leading others. This topic area includes the training of stewards, instructors, staff and executive members; leadership skills, parliamentary procedures, and organizational administration.

Some topic areas, such as International Scene and Labour's Role in the Community have grown very slowly and marginally. Nevertheless, there has been growth in all topic areas. Taken altogether, the topics available to members of independent labour organizations provide a substantial, as well as practical, education.

Figure 3-j indicates that there has been an increase in the evaluation of programs by the independent labour organizations themselves. This increase coincides with the introduction of an evaluation form by Labour Canada which asked individual organizations to report on their evaluation (or feedback) activities. Examples we have collected from selected organizations indicate that evaluation practices are simple and reflect the organizations' prior involvement in educational processes and available resources. Evaluative materials which are being collected appear to be used, with increasing frequency, to plan future programs. Collection of this information from individual organizations could be used in future evaluations by Labour Canada.

Recommendation: Labour Canada should explore the extent and nature of evaluation activities within the independent labour organizations, with the intent of making use of such information in regular reporting procedures and as a basis for future large scale evaluations of the Labour Education Program. Labour Canada should assist independent labour organizations in the development of simple, practical and regular evaluations processes.

2.5 Finance

In almost every case, federal funds have contributed to programs which were already in existence. For example, the Eastern Nurses School was already in operation prior to 1977. Grants to the Nova Scotia Nurses' Union, the Prince Edward Island Nurses' Collective Bargaining Committee, the New Brunswick Nurses' Union, and one nurses' organization from Quebec were used to send participants to the school and defray the costs of instructors and resource persons. The fact that most educational programs were already in existence means that few, if any, are totally dependent on federal assistance. It also means that isolating specific effects arising from federal expenditures is exceedingly difficult. Table 3-16 indicates that by the end of four years (in four regions only), Labour Canada had contributed $656,635 toward educational expenditures, while total educational expenditures reported by recipient labour organizations totalled $1,799,093. That is, Labour Canada contributed about 36% of total educational expenditures. By combining information from Table 3-16 on expenditures and Figure 3-c on participation rates, we find the following:

Table 3-17

	Year I	Year II	Year III	Year IV	Totals
Reported Expenditures	$436,557	$334,968	$414,159	$613,409	$1,799,093
Total Federal Grants	$188,345	$115,074	$147,802	$165,417	$ 656,635
Total Participants	5,500	7,600	6,400	5,600	25,100
Average Cost per Participant	$79.37	$44.07	$64.71	$109.54	$71.68
% of Reported Expenditures Covered by LEP Grant	43.1%	46.3%	35.7%	27.0%	36.5%

The figures in Table 3-17 indicate that the LEP's relative proportion of the costs of participation of one independent labour organization member is declining from a high of 46.3% in year II of the program to 27.0% in Year IV of the program. By any measure the costs per participant are very low for an educational undertaking. These figures become more significant when it is seen that the independent labour organizations are bearing nearly two-thirds of the costs from their own revenues.

The methods by which independent labour organizations report information to Labour Canada leaves us with three problems. First, we cannot draw any conclusions on the basis of a standard unit, such as one student-day. The costs shown in Table 3-17 are averages of expenditures reported by many different organizations and are not much help, therefore, to either Labour Canada or to the independent labour organizations in calculating the relative costs or benefits of different types of activities. For example, we cannot assess whether the reported increase in programs of longer duration is more or less expensive in the long run. Clearly, there are other factors which must be taken into consideration when assessing the potential learning associated with longer periods of intense application. Nevertheless, it would be an advantage to be able to assess the financial benefits of various types of events.

The second problem arising from current reporting procedures lies in the fact that federal funds need not be requested for, nor reported in relation to, identifiable educational events. Some independent labour organizations, such as the B.C. Hospital Employees' Union, use federal funds to defray about 10% of the costs of a very large education endeavour and report on the entire program as one event. Others, such as the Manitoba Teachers' Society, operate a large and diversified series of educational activities and report on all activities, even though federal funds only cover partial expenditures of one such activity. Still others, such as the Saskatchewan Union of Nurses, report on expenditures only to the extent that they can justify the federal grant received, even though it is clear from the records that their educational program is much larger and more costly. The expenditures reported and the categories within which these are classified sometimes seem to reflect the whims of the person responsible for filing the evaluation report. For example, one organization reported all expenditures in various categories in multiples of $141. It seems likely that the total amounts are accurate but that the division of this total into various categories is less reliable.

The results of these reporting procedures are two. First, financial support from the federal government is rarely reported by the independent labour organizations to their members as being related to specific events or specific expenditures within an event. The source of financial support for educational activities often remain unidentified and, therefore, unknown to the individual participant. In general, educational events were seen, by most respondents in our survey, as being funded from the financial resources of the organization itself (see Chapter 2, Table 2-1).

If the Federal Government wishes to obtain the recognition it deserves for its contributions to educational activities, then greater effort must be put into making sure that financial contributions from federal sources are publicly acknowledged, without intruding unnecessarily on the no-strings policy.

The third problem which results from the current procedures for reporting expenditures is that we cannot determine, with any precision, what the real costs of educational activities might be.

The greatest accuracy appears to be in the reporting of travel, meals and lodgings, presumably because these expenditures are directly charged to the labour organization. The least accuracy appears to be in the reporting of administrative costs which are not itemized or costed per hour or per task by most organizations. Administrative expenditures are probably estimated as a small fraction of the day-to-day administrative costs of the organization.

We note that there is a steady increase in expenditures related to Wage Recovery and Benefits to Students, which corresponds to the increase in activities on workdays. There is a steady decrease in the

Preparation and Production of Educational Materials which does not appear to fit with the general increase in the reported acquisition or development of educational materials specifically designed for the educational activities reported (see Figure 3-m). It is possible that educational materials were prepared in years I and II of the program and are only up-dated and reproduced in years III and IV. What is clear is that the independent labour organizations have opted for print materials which can be considered the least expensive of educational materials. Very few organizations have attempted to develop their own video or audio-tape resources although some purchase or borrow these from outside sources such as post-secondary systems.

While the figures provided in Table 3-16 do not indicate a large variance in Instructor and Consultant Fees, those shown in Figures 3-k and 3-l suggest that specialists are being used with increasing frequency to design, implement and attend educational activities as resource persons. It seems likely that many of these specialists come from within the labour organizations themselves and that their fees and expenses are covered under administration or personnel expenditures, and are therefore not reported to Labour Canada. The questions related to the development and production of resources specifically for the educational event being funded, were introduced in year III. The questions, as they are currently worded on the evaluation form, are vague and provide only very general trends. However, it seems apparent to us that the independent labour organizations, when faced with the choice between making or buying educational resources, have chosen to make their own and, whenever possible, to use resources from within their own organizations, relying on external consultants only when necessary.

Recommendation: Labour Canada should review the system of reporting which is now required of independent labour organizations with the object of obtaining more standardized information. Such standardized information would be of value to both Labour Canada and to the independent labour organizations.

Recommendation: Labour Canada should develop, in cooperation with the independent labour organizations, acceptable means whereby federal contributions to educational activities receive greater and more systematic recognition.

2.6 Conclusions

We noted at the onset that the intent of this section was to deal with matters outside the immediate decision-making processes of Labour Canada. However, most of the recommendations in this section have been directed to Labour Canada because there is no other way to reach the constituents of this sector of the LEP and the labour movement. The recommendations are stated in a manner which indicates our belief that this sector of the LEP would benefit from increasing cooperation between Labour Canada and the independent labour organizations. The LEP has created an entirely new relationship between the federal authorities and the independent labour organizations in Canada. A cooperative relationship between the two interest groups is the most desirable type of relationship because it involves, not legislation and control, but rather consultation and encouragement for the development of human and organizational capabilities. The membership of the independent labour organizations, nearly one-quarter of the organized working force in Canada, would benefit from the positive result of a cooperative relationship. For this reason, we have concentrated our recommendations on those parts of the LEP which are not working as well as might be possible. We have glossed over the undeniable benefits accruing from that component of the LEP which is directed toward the independent labour organizations. While the Canadian labour movement, and the Canadian society as a whole, clearly benefit from the existence of large federations of labour organizations that command resources and authority in the pursuit of the goals of the labour movement, it also benefits from the existence of smaller, independent labour organizations with well-trained members. A powerful example is provided in the contrasting experiences to be found between the large federations and the Christian Labour Association of Canada. CLAC, as an independent organization, persists to a degree considerably greater than its numbers would suggest and maintains an alternative perspective in the practice of labour relations.

We believe that the proportion of the Canadian labour force currently represented by the independent labour organizations will increase over time; and that Labour Canada should reinforce the good judgement shown in the initial design of the LEP by strengthening this component of the program, by increasing Labour Canada's role with respect to improving the quality of the educational programs, and by reducing the present inequities in the distribution of funds.

FIGURE 3-b.

INDEPENDENT LABOUR ORGANIZATIONS

Comparison of Various Statistics over Four Years (1977-1981)

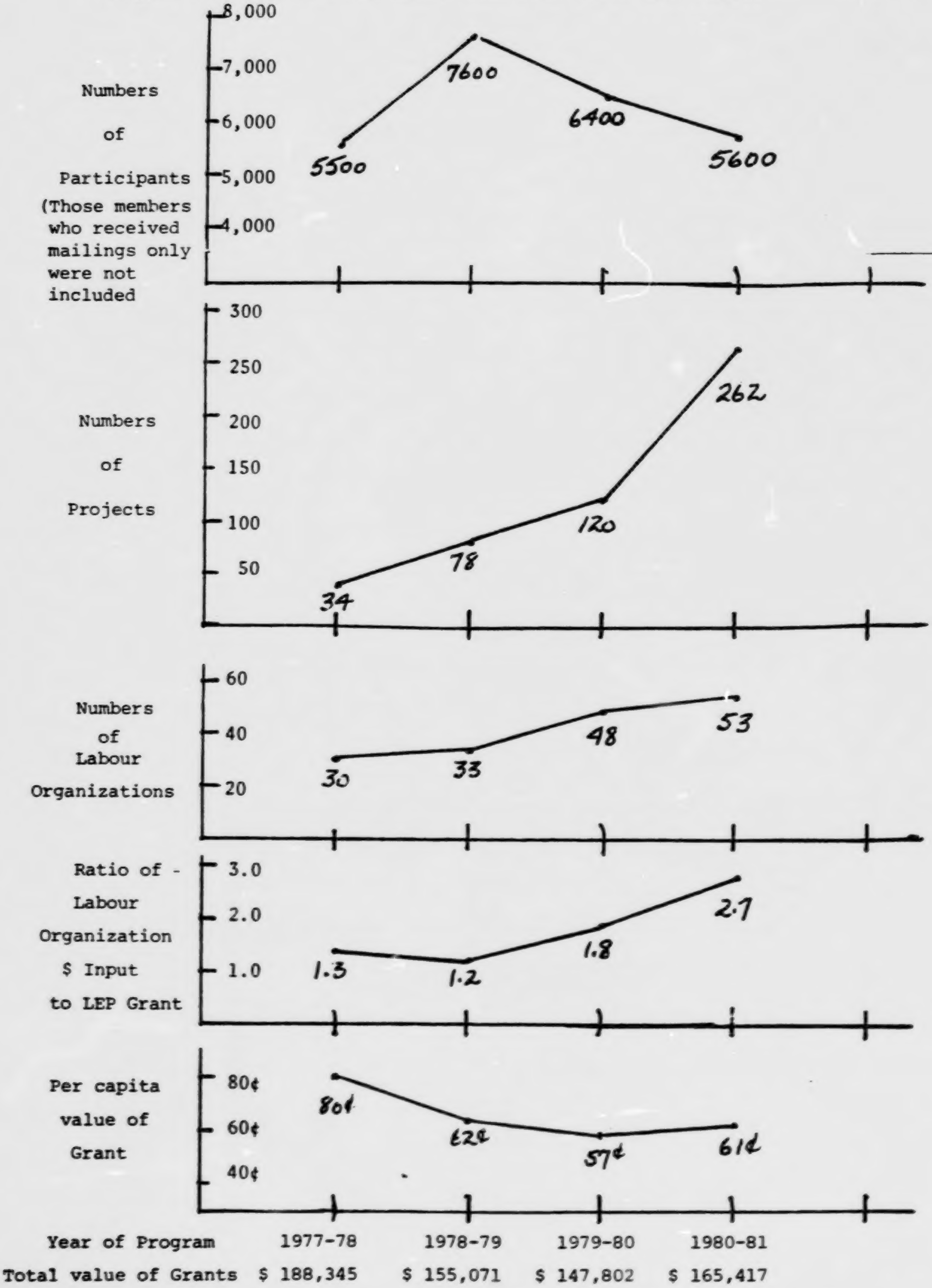


FIGURE 3-c

Independent Labour Organizations

Participation Rates by Year
(Four Regions Only)

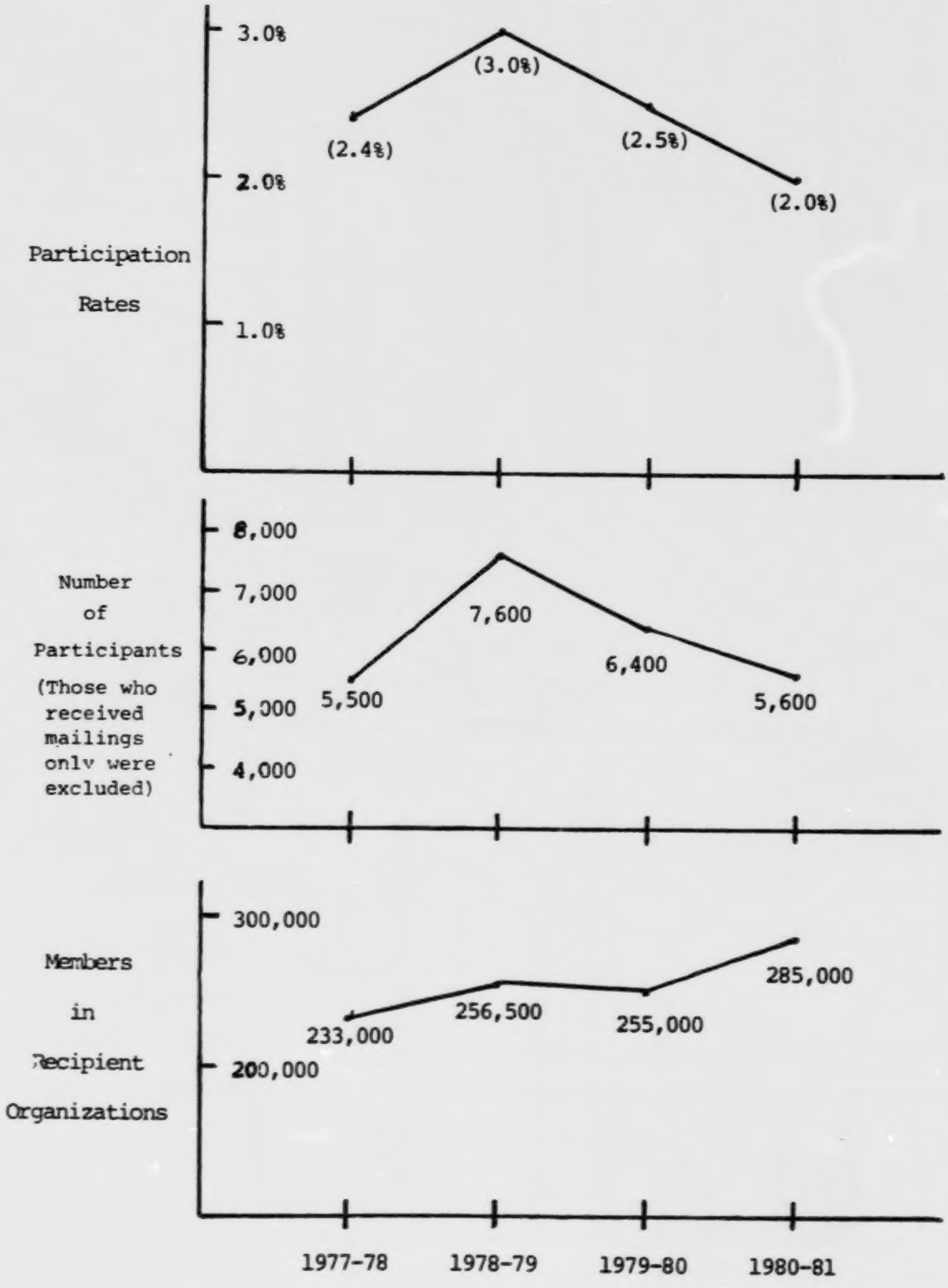


FIGURE 3-d

INDEPENDENT LABOUR ORGANIZATIONS - Segment of Membership Served

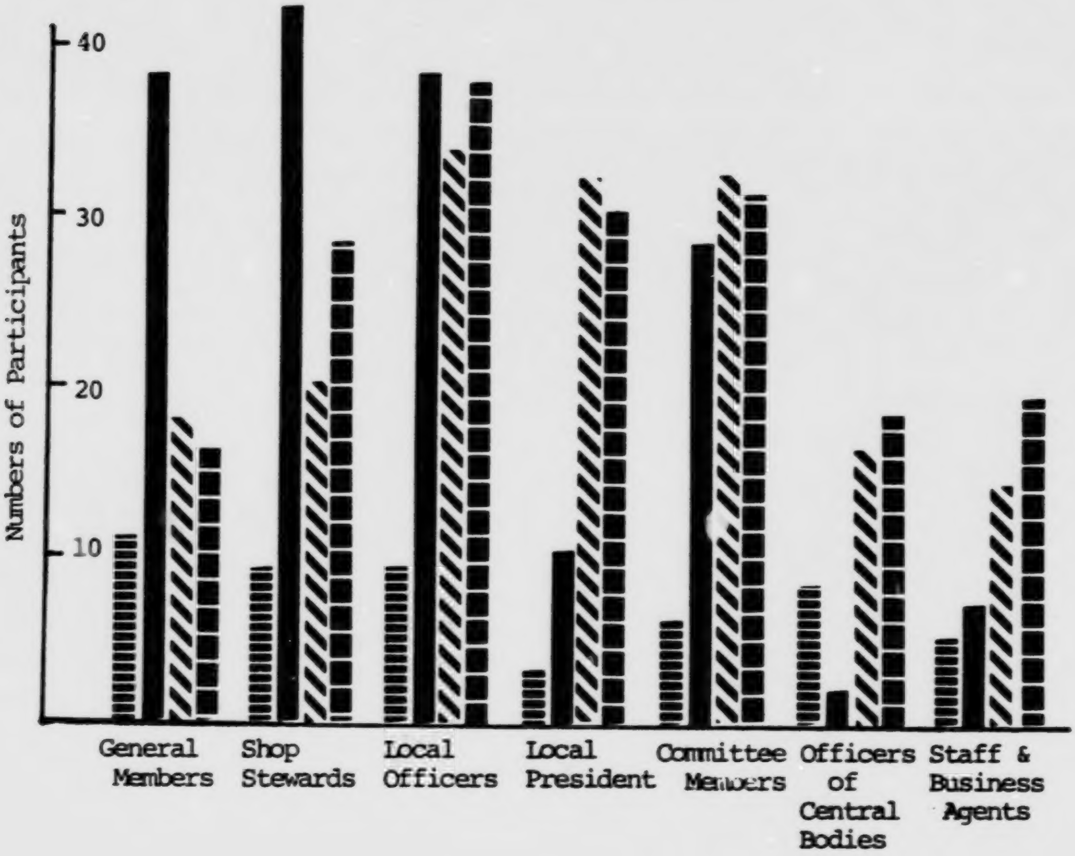


FIGURE 3-e

INDEPENDENT LABOUR ORGANIZATIONS - Type of Event

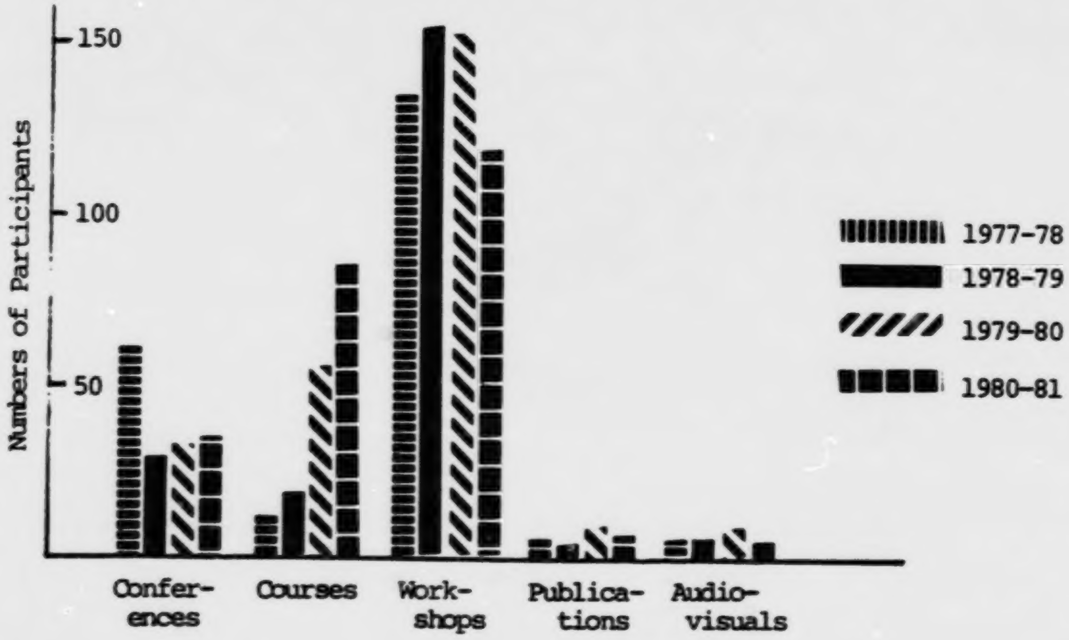


FIGURE 3-f

INDEPENDENT LABOUR ORGANIZATIONS - Duration of Events

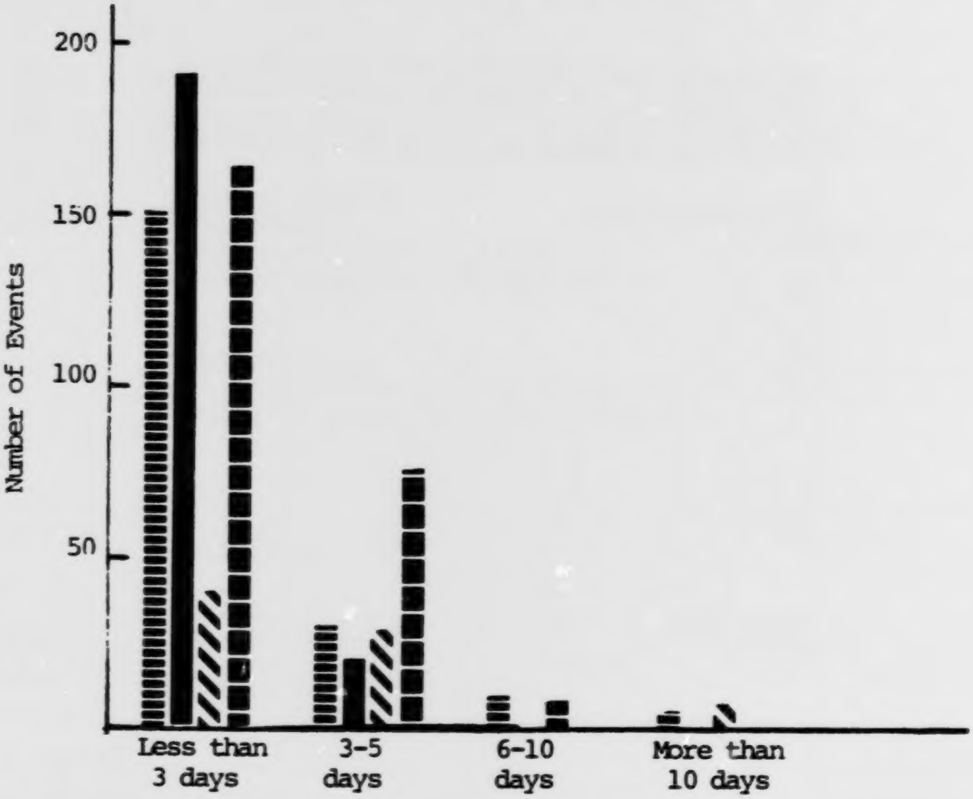
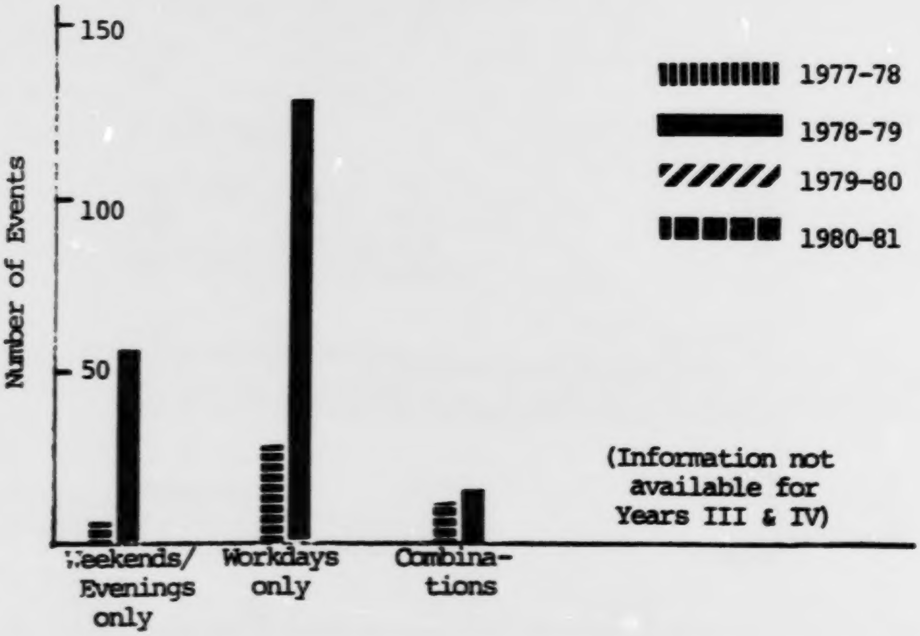


FIGURE 3-g

INDEPENDENT LABOUR ORGANIZATIONS - Time Pattern of Events



(Information not available for Years III & IV)

FIGURE 3-h

INDEPENDENT LABOUR ORGANIZATIONS - Stated Objectives of Programs

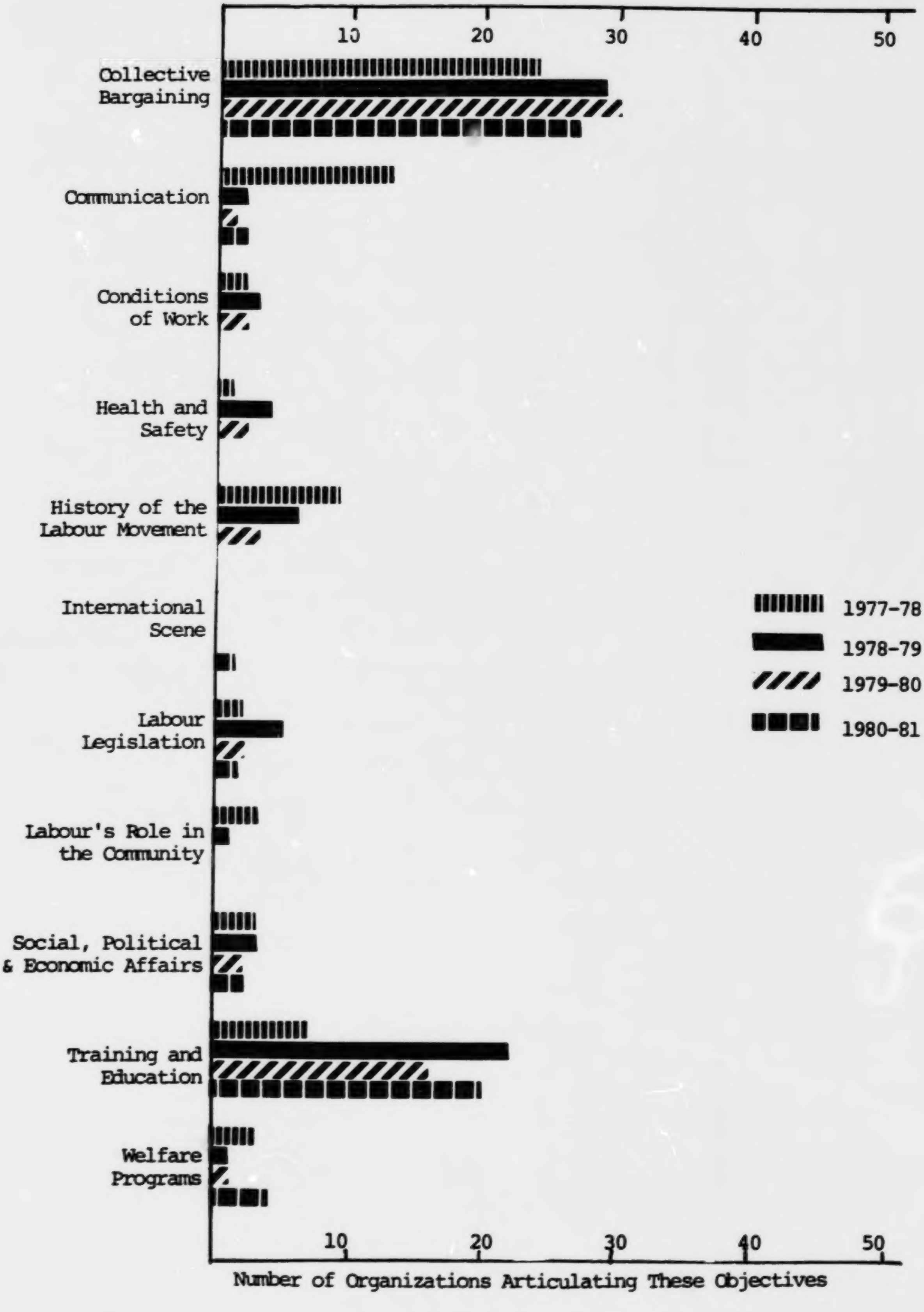


FIGURE 3-i

INDEPENDENT LABOUR ORGANIZATIONS - Range and Frequency of Topics Reported

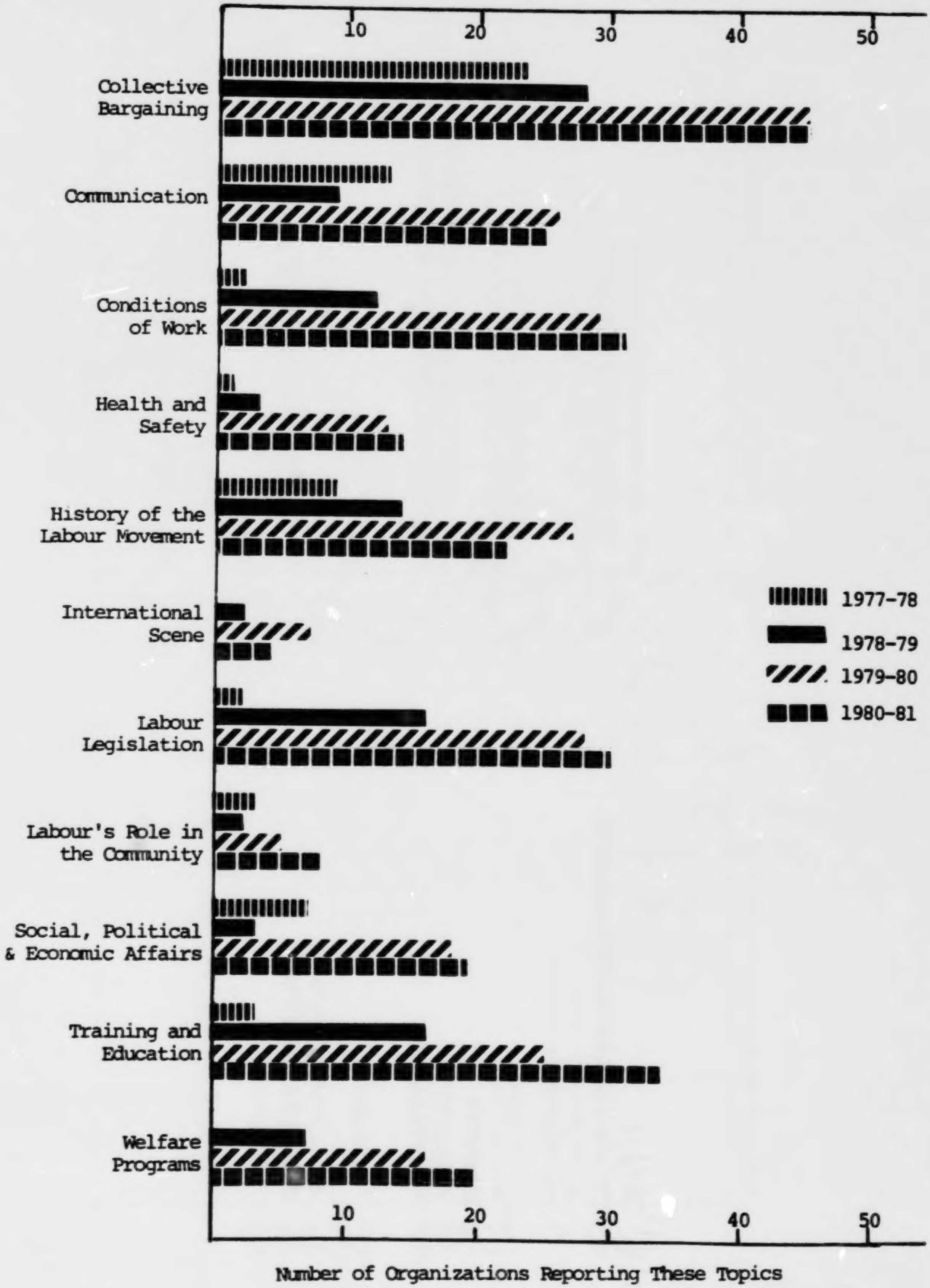


FIGURE 3-j

INDEPENDENT LABOUR ORGANIZATIONS - Use of Feedback

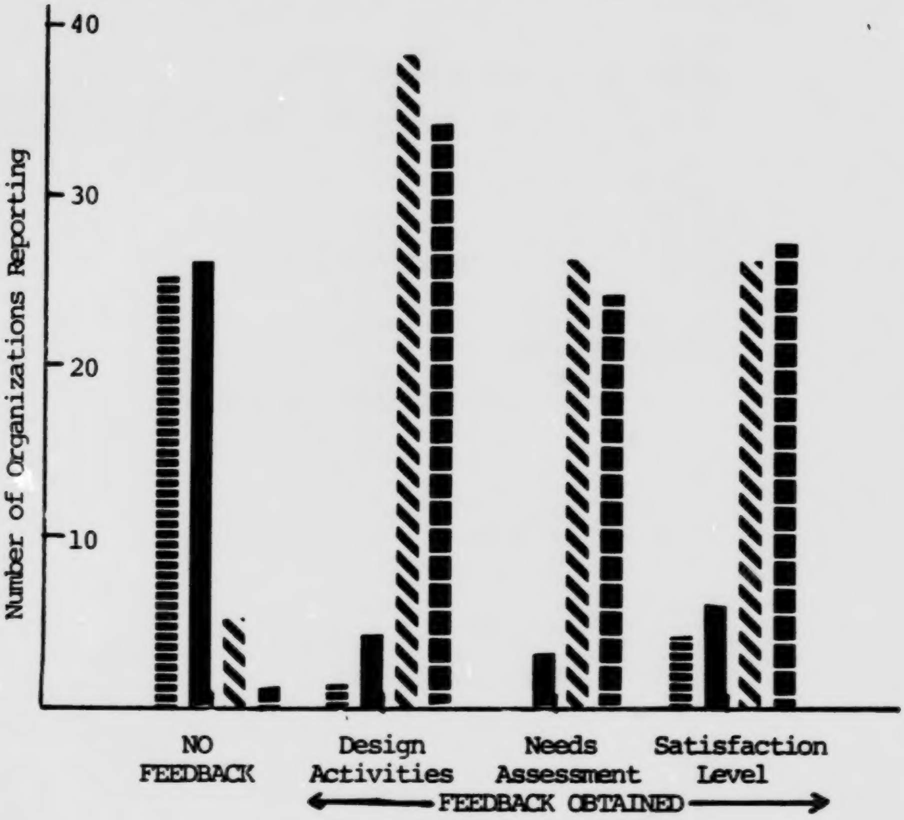


FIGURE 3-k

INDEPENDENT LABOUR ORGANIZATIONS - Use of Specialists

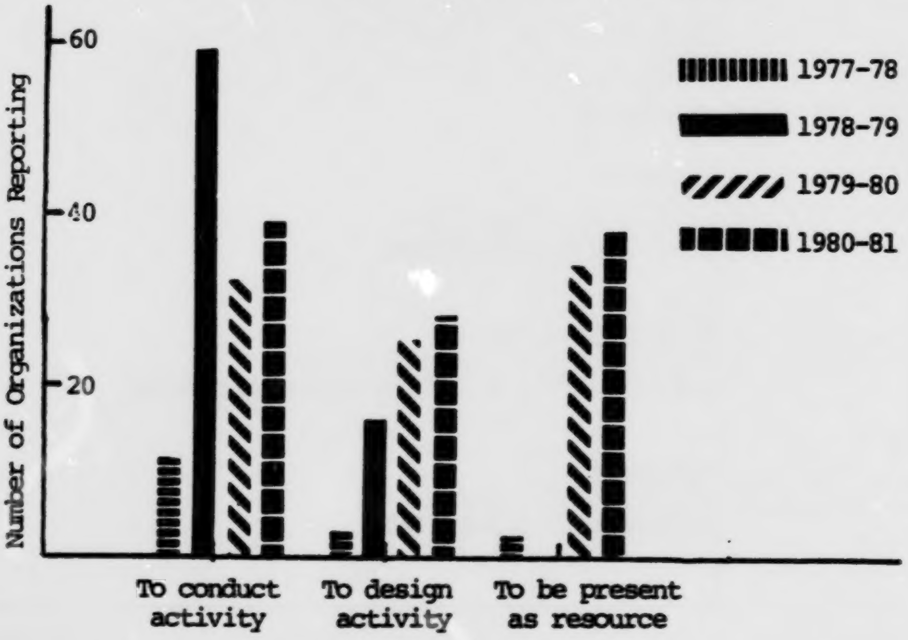
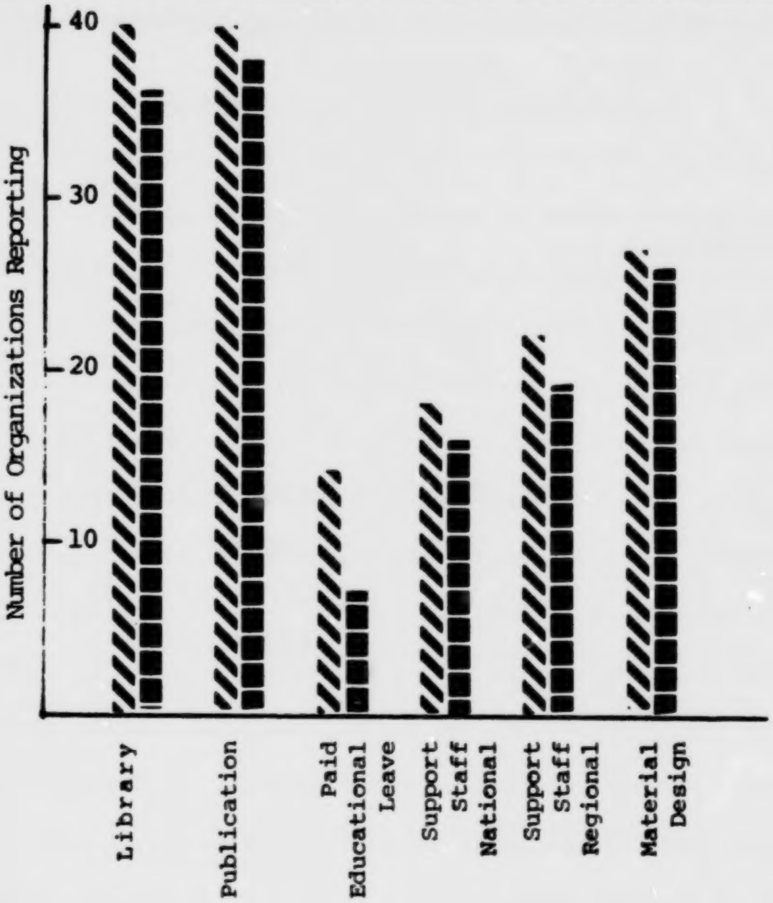


FIGURE 3-1

INDEPENDENT LABOUR ORGANIZATIONS - Other Educational Activities



INDEPENDENT LABOUR ORGANIZATIONS - Use of Specially Designed Materials

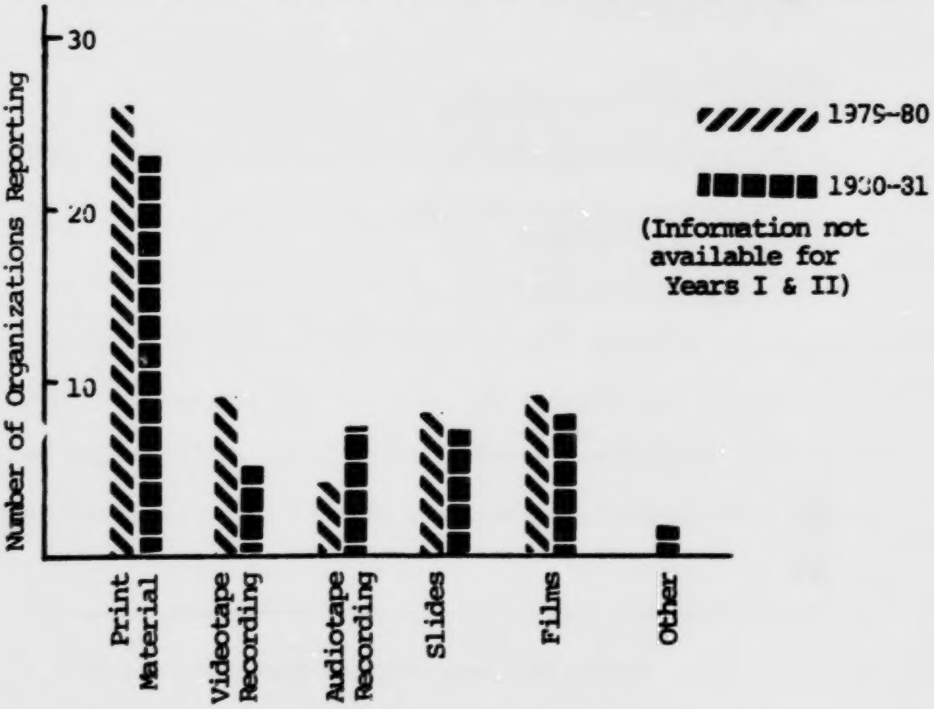
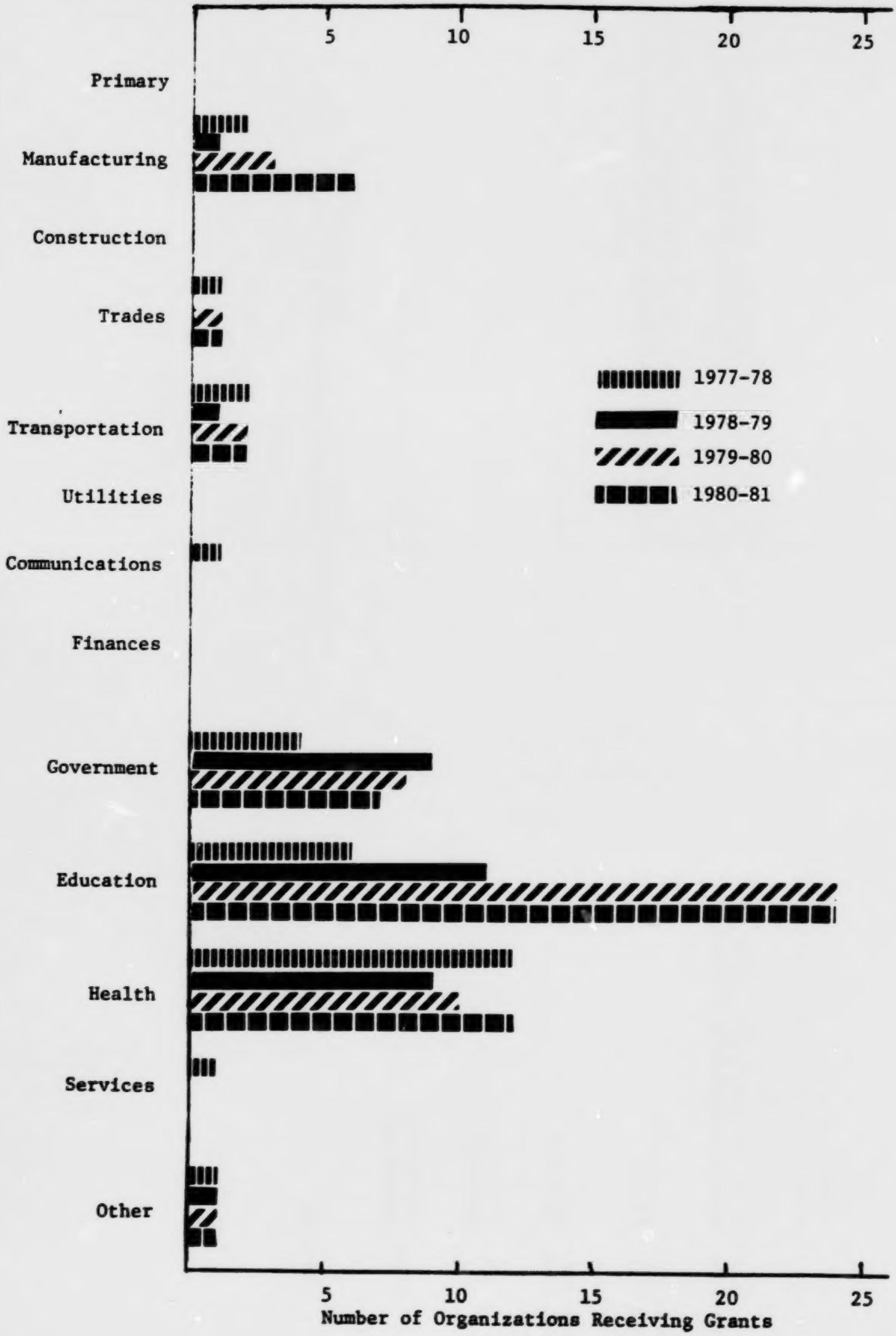


FIGURE 3-m

INDEPENDENT LABOUR ORGANIZATIONS: Distribution of Grants by Industrial Sector



Section 3: The Canadian Conference of Teamsters

3.1 History, Structure and Nature of the Teamsters

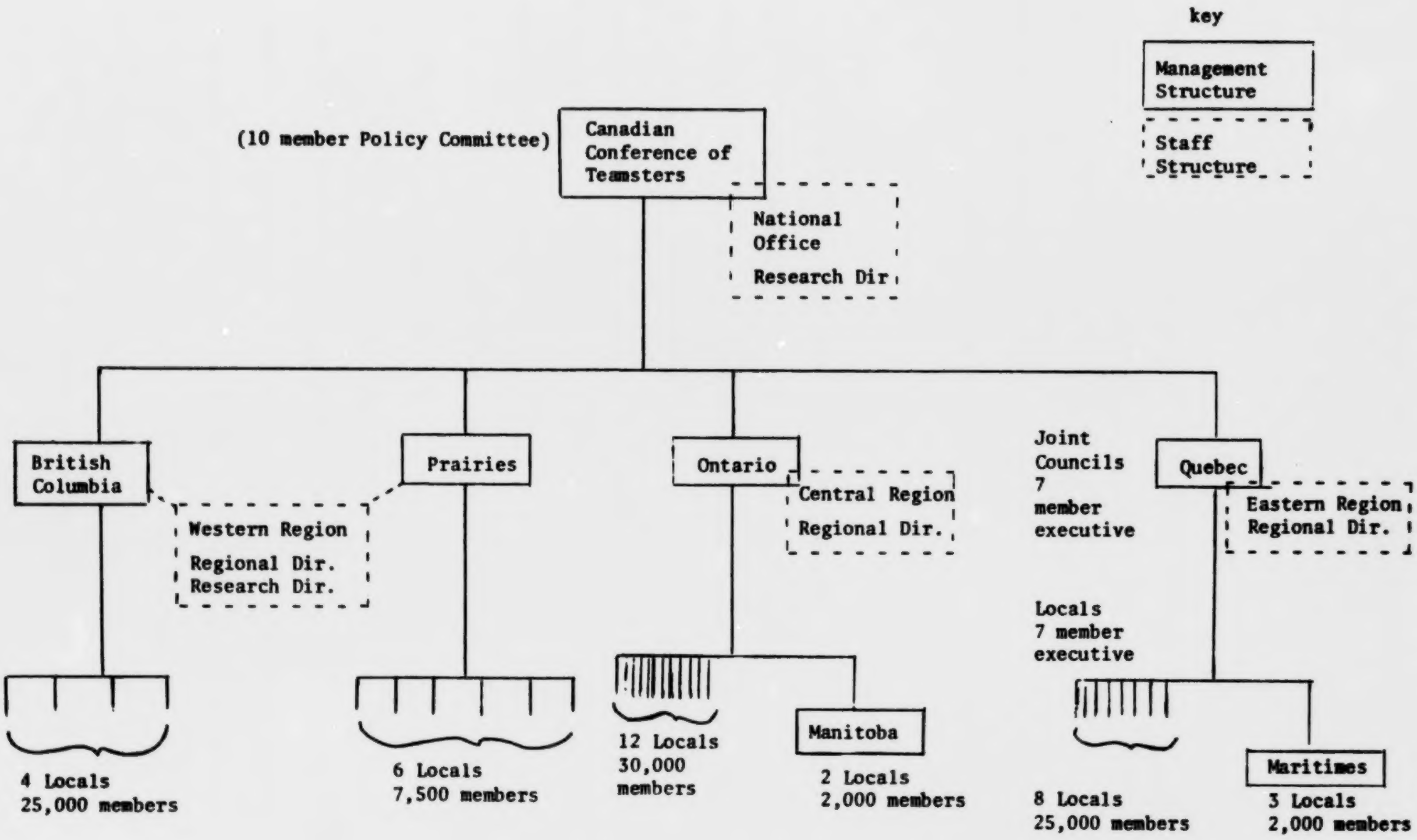
The International Brotherhood of Teamsters is an independent labour organization which originated in North America in 1903. It has developed a unique combination of centralized authority and local control. The Canadian Conference of Teamsters (hereafter referred to as the "Teamsters") conforms to this pattern and was created as a Canadian Conference following the reorganization of long-standing ties between Canadian-based locals and various American Area Conferences. When Labour Canada initiated the Labour Education Program in 1977, the Teamsters were working through the general developmental problems common to all young organizations. The agreement between Labour Canada and the Teamsters called for the establishment of additional organizational mechanisms to carry out the terms of that agreement.

The Teamsters is the largest independent labour organization in Canada and the sixth largest in size among Canadian unions. It currently has over 90,000 members, with locals in every province except Prince Edward Island. The management of this organization is democratic and highly formalized. There are 71 locals, each with an elected, seven-person Executive Board composed of a President, Vice-President, Recording-Secretary, Secretary-Treasurer, and three Trustees. Each local is autonomous and makes its own decisions, handles its own funds, and carries out its own negotiations and arbitrations. The Executive Board of each local sends representatives to the Joint Council for the area, of which there are four currently in existence. Each Joint Council elects a similarly constituted Executive Board which handles questions of jurisdiction. Joint

FIGURE 3-n

Canadian Conference of Teamsters

Schematic Representation of Management Structure and Staff Structure


key
Management Structure
Staff Structure
(10 member Policy Committee)
Canadian Conference of Teamsters
National Office
Research Dir
British Columbia
Western Region
Regional Dir.
Research Dir.
Prairies
Ontario
Central Region
Regional Dir.
Joint Councils
7 member executive
Quebec
Eastern Region
Regional Dir.
Locals
7 member executive
4 Locals
25,000 members
6 Locals
7,500 members
12 Locals
30,000 members
Manitoba
2 Locals
2,000 members
8 Locals
25,000 members
Maritimes
3 Locals
2,000 members

Councils have some paid staff members who may include lawyers, organizers, and others. In Canada, there are four such Joint Councils, each represented on the Area Conference for Canada or the Canadian Conference of Teamsters. Each Area Conference has a ten-member Policy Committee, elected by local Executive Boards, which deals with issues related to research, education, human relations, government relations, health and safety, and organizing (see Figure 3-n).

In addition to these policy, decision-making and management structures, there is a staff support system composed of three Regional Offices and a National Office (see Figure 3-n). Each Regional Office has a Director and support staff to aid locals and Joint Councils.

As a whole, the Teamsters had no formal educational program prior to the LEP. Certain locals occasionally organized and implemented educational activities. However, educational activities for the most part were informal in nature. The only formal educational component available was a week-long seminar sponsored by the International Brotherhood of Teamsters at its Teamster Academy in Washington, D.C.

The contract between Labour Canada and the Teamsters is similar to the agreement with other large labour organizations in identifying that the target groups for educational activities included officers, officials and potential labour leaders, in specifying general objectives for educational programs, and in requiring separate administrative and accounting procedures to be established to deal with funds from the LEP contract.

In accordance with the contract, an Educational Administrative Committee was struck and held its first meeting February 24th, 1978.

The initial committee was first extended to include the Director of Research for the Western Region and the Director of Chemical Workers. The National Director of Research was given the responsibility for the overall management of the contract. The committee was further extended in 1980 to include a representative from Manitoba (see Figure 3-o).

Figure 3-o

Composition of the Educational Administrative Committee

Canadian Conference of Teamsters

Title/Position	Geographic Location
Director, Canadian Conference of Teamsters	Vancouver
* National Director Research	Ottawa
Regional Director	Vancouver
* Education Director	Vancouver
* Regional Director	Toronto
* Regional Director	Montreal
* Director Chemical Workers	Toronto
Labour Canada	Ottawa
Representative from Manitoba (added in 1980)	Winnipeg

*Direct responsibilities for Labour Education Program in planning, organizing, and management.

In response to an inquiry by the evaluation team, the National Director Director of Research wrote:

> Our program is decentralized to the Regional level rather than centralized at the National level. We realized quickly that the size of the country, varying degrees of membership and officer awareness, language barriers and our internal political situation required a flexible regional approach more adapted to local realities. While this approach might seem to lack uniformity and co-ordination, it has enabled us to hold more seminars that are acceptable to local officers than would have been possible in a

very centralized program. (July 14, 1980)

In this approach, the Regional Directors for the Eastern and Central Regions have assumed control of their respective educational program, with the Eastern Regional Director hiring, on a limited basis, one union member to help organize activities in Quebec. In the Western Region, a Research Director was employed to take responsibility for that area's educational programs, a responsibility which requires about two-thirds of his time. The Director of the Chemical Workers, a new and large division of the Teamsters, supervised an autonomous educational program until these activities were assimilated into the overall program budgeting in the second year of the LEP. The National Director of Research plans and manages the educational programs for the three locals in the Atlantic provinces.

The Educational Administrative Committee meets annually in accordance with the LEP contract requirements. While preliminary work and planning takes place at the Regional levels, plans are brought to the Administrative Committee for approval. The National Committee is mainly concerned with policy definition, administration, and limited supervison of educational programs. The first two years of the LEP contract were primarily ones of initiation and organization. Basic organization was in place by 1978 and educational programming had begun. The third and fourth years of the LEP contract have focused primarily on the development and implementation of educational programs for various target groups and on the production of learning resources.

3.2 Educational Activities

Each Teamster local invariably relates to many employers and many different contracts, while each chemical workers' local relates to one employer and one contract. This fact, and the organizational characteristics described above, combined with the Teamsters' history as being predominantly business unions, suggest reasons why the organization has depended on the employment of consultants, particularly lawyers, for the purposes of meeting their collective bargaining objectives rather than engaged in training their own members to handle negotiations and arbitration. The absence of any educational program prior to the provision of federal funds was one result of this practice. These circumstances throw light on the nature of the educational programming which has been developed since the Teamsters contracted for funds from the LEP.

Chapters One and Two report the results of telephone interviews with participants in Teamster educational programs. In general, despite different styles of programming, outcomes for Teamster participants are similar to those obtained from CLC participants. Enthusiasm and attendance are growing despite the fact that the Teamsters continue to make considerable demands on the personal resources of individual partcipants in terms of both time and money. Self-confidence is reported to have increased. Indviduals' understanding of the rights of employers and employees was reported as having changed.

The distribution of educational events across regions and topics is shown in Tables 18 and 19 and in Figure 3-t. Growth between years I and II and years III and IV can be seen by comparing Tables 3-19a and 3-19b. The variance in the percentage distribution of events and participants across the three regions, as reported by the Teamsters, shows a larger than expected level of participation in Ontario. This is accounted for by the fact that Ontario mounted large seminars in the first and fourth years which were attended by over 100 participants. Other events, in both Ontario and the other two regions, tended to be small group seminars for 20-35 participants or involved the attendance of several senior officials or staff members at conferences or educational workshops. Seminar programs have tended to focus on training for shop stewards, local officers and business agents; and on basic topics such as collective bargaining, conditions of work, health and safety, and legislation affecting contracts. Senior officers and staff members have attended conferences and workshops in which the topic has tended to be an in-depth examination of selected areas in labour relations or legislation.

The fact that educational events have tended to be mainly one- or two-day seminars suggests that the Teamsters experience a special problem in gathering more than 20 members from various locals for longer than 48 hours at any given time. We experienced some difficulty in reaching the individuals who were selected for our telephone survey. Many individuals were away from home for days at a time; and even when we arranged a specific time for a call-back, we sometimes had trouble reaching the individual. One observer commented that, given the working conditions among Teamsters, a powerful result of the educational program has been the satisfaction arising from simply being gathered together as a group.

Recommendation: The Canadian Conference of Teamsters through its Educational Advisory Committee should consider the development of educational opportunities which will maximize the national focus of programs to encourage cooperative and national efforts within the organization. This recommendation does not minimize the importance and necessity of regional events.

In the early years of the LEP, the Teamsters sent a group of senior officers to the Teamster Academy in Washington, D.C. Our first evaluation of this program suggested that it was of value to Canadian leaders. However, we were not convinced of its value in comparison with other educational needs of the Canadian Conference as reflected in the LEP contract. The Teamster Academy has since been discontinued. The Canadian Conference has decided to concentrate its attention on greater varieties of leadership training. We hope that the Teamsters will replace the Academy experience with comparable educational opportunities for individuals in senior leadership positions.

We know from our interviews with senior staff members that, while educational officers encourage maximum participation from members (and locals) with no previous experience in labour education, the response from locals is uneven. Commitment to educational activities also varies substantially from one region to another with the highest commitment to the ongoing development of programming being found in the Western Region.

Recommendation: The Educational Advisory Committee should ensure the regular provision of educational opportunities for senior officers of the Canadian Conference of Teamsters with a focus on Canadian issues and organizational concerns.

The enthusiasm for education is growing among members of the Teamsters and its locals, with resulting pressures on the national organization and funds from the federal contract. While our interviews with senior staff members implied the view that the Teamsters' educational program might collapse without federal funds, this view was not borne out by the results of our telephone survey. Clearly pressure will be generated at the grass-roots level to maintain an educational program, funded through union dues.

While the data in Figure 3-t suggest a strong emphasis on training and education, we must point out that events classified in this category usually covered multiple topics and were mainly concerned with improving the functional level of shop stewards. The review of the manual for shop stewards, prepared in the first year of the LEP, indicates that the major focus in shop steward training is on the handling of grievances.

Of equal interest is the relatively low commitment to the topics of History of the Labour Movement, Labour's Role in the Community, and Social, Political and Economic Affairs, topics which reflect what might be termed the "culture of trade unionism". While the existing emphasis is understandable and commendable, it is likely that continuing success in educational endeavours will eventually create a demand, not only for more advanced opportunities in areas already being covered, but also for opportunities to focus on topics not now covered. It is here that the absence of long-range planning is in evidence and raises some problems. If the educational activities are to continue and to grow, the Teamsters will need to face the inevitable problems of developing advanced and sequenced materials and programs, and of encouraging and supporting the individual development which accompanies any investment in education.

Recommendation: The Canadian Conference of Teamsters should engage in utilizing this assessment, among others, of their educational activities to date, as a basis for formulating long-range plans for future development. To this end, the Teamsters might consider the possibility of having the Administrative Committee meet more than once a year and of creating a small educational planning and resource group within that committee.

3.3 Resource Development

By the end of the first two years of the LEP, the Teamsters had produced a Manual for Shop Stewards. The manual was produced for the Western Region and, since its introduction, some 300 copies have been distributed. It has been translated into French for use in Quebec and the Atlantic provinces. It has not been used in Ontario. A second manual is being prepared for the Ontario Region but was unavailable at the time of this phase of the evaluation. The manual is reviewed in Chapter 5.

In the early years of the LEP extensive purchases of audio-visual equipment were made but there was evidence of only limited use of this equipment in instructional activities. In the third year of the program several senior officers and staff members in the Western Region attended courses offered by Sony of Canada on the utilization of television cameras and the production of video-tape resources. Nevertheless, we still found little evidence of the use of the equipment or of the development of audio-visual learning resources. The Teamsters are not alone in their relative delay in producing or using effective non-print materials. However, it does appear that a more deliberate and systematic appraisal is required in the planning and utilizing of this equipment.

Recommendation: The Administrative Committee should devote special attention to the present use and future potential of the audio-visual equipment obtained with the assistance of federal funds.

Expenditures on library collections, absent in the first two years of the program, now represent over $8,000 or 2.5% of total expenditures over four years. The libraries appear to be well-planned collections of technical material used primarily by specialists, legal consultants, and some senior staff members. These collections are of value to the ongoing research activities and needs of the Teamsters and are of some value to the ongoing educational activities. However, the materials do not appear to be designed to be of assistance to more junior staff members, local officers, and shop stewards; and the relationship of the materials to the future development of educational programs is not clear.

Recommendation: The Administrative Committee should evaluate the policy of library development and usage and of resource acquisition with respect to their value for the educational programs, in addition to their value for other organizational activities.

3.4 Finance

Over the four year period of the LEP, the Teamsters have received $343,104, an average of $1.00 per member per year. The initial delay in signing the contract with the Federal Government and careful planning produced a substantial surplus in the first year. This surplus has since been used to defray expenditures in subsequent years, leaving a small surplus of $11,000 to carry over into the fifth year (see Table 3-20). As in the case of the other labour organizations, the Teamsters faced the danger of stimulating expectations in the first year which could not be met in subsequent years and, accordingly, have planned judiciously. Aspirations have risen slowly and not out of proportion with the funds available over the five year period. During the four years under review, expenditures have been equally divided between program expenses and development (43%) and administration and personnel (55%). The largest expenditure was, as might be expected, for salaries. There has been a commensurate rise in spending on educational activities at the local and regional levels.

The Teamsters do not pay lost wages and expenses directly to participants, but share the costs with locals which then reimburse individuals. The fact that most of their educational events are held over weekends minimizes the demands for lost wages. While precise figures are not available, it is clear that spending on educational activities over and above the level of federal funding has been rising and the principle of cooperative funding among different levels of the organization has been well-established.

It seems clear to us that the foundations are being laid for the survival of the educational program with diminished federal funds, if necessary. In the fourth year, a two-day conference held in Banff for business representatives and local officers was so successful that the suggestion was put forward to increase the per capita dues paid by members as one means for financing such events each year. When we consider that prior to the availability of federal funds there was no effective educational program within the organization, these developments take on additional significance.

3.5 Evaluation

The Teamsters believe that the size of their educational program did not justify the collection of information on which regular evaluation might be based. They have preferred to depend on the results of evaluations included as part of the federal contract for information about the quality of their programs. At present there is no means for the systematic collection of information at the national level, although at least one local in the Ontario Region has become involved in evaluation.

It is clear that the Teamsters ought not to burdened with sophisticated and expensive procedures for information collection; it is also clear that there is no guarantee that future contracts with the Federal Government will include plans for extensive independent evaluation activities. Indeed, we have recommended that the Federal

Government should plan for regular ongoing evaluation activities among all parties to future contracts, in contrast to the two large evaluation projects of the first four years of the LEP. Such evaluations would, in our opinion, be of greater value to the various parties involved. In addition, the growth in interest and activity and the need for long-range developmental planning would suggest that the Teamsters could profitably engage in the collection of simple information in a systematic way for their own use.

In the Western Region, educational programming has been mostly in-house, in the sense that where alternatives were possible the choice has been to make print resources. In contrast, in the Ontario Region substantial use has been made of the resources offered by community colleges. Because of the importance and sensitivity involved in the relationships of labour organizations to post-secondary organizations, some evaluation of the relative efficacy of these different practices should be undertaken.

Recommendation: The Administrative Committee should consider the development of simple, yet systematic, means for the collection of information about participants, interests, needs, and achievements associated with their educational programs. Such activities need not burden program staff and would contribute to more effective and efficient planning.

3.6 Conclusion

We have commented on the recent origin of the Canadian Conference of Teamsters and on the need for the development of Canadian-based educational experiences for middle and senior officers. The very creation of a Canadian Conference suggested an organizational response to needs that deserved as much attention from the educational planners as from any other. Clearly the increase in participation in education across the entire organization reflects an increasing involvement in Canadian matters on the part of most participants. The development of comparable opportunities for senior officers and the termination of participation in the Teamster Academy are encouraging strides toward fulfilling the objectives of the LEP. While the main emphasis in educational activities seems somewhat over-concentrated in a few areas, we recognize that in organizations such as the Teamsters in which leadership is elected, the margin for educational experimentation is small. With the growth of financial cooperation among different levels within the Teamsters, in addition to federal funds, it would appear that leadership has been exercised, and exercised with care. The new problems will lie with planning, development and evaluation, both of individual learning and of the program as a whole--the inescapable consequences of success.

TABLE 3-18

CANADIAN CONFERENCE OF TEAMSTERS

Comparison of Participation Rates by Region

	EASTERN REGION	CENTRAL REGION	WESTERN REGION	TOTALS
Estimated membership for 1980	27,000	31,000	34,000	92,000
% distribution	29%	34%	37%	100%
Number of events held during 1980-81	14	8	19	31
% distribution	45%	26%	29%	100%
Number of participants in events held during 1980-81	228	415	276	919
% distribution	31%	43%	26%	100%
Participation Rates 1980-81 only	0.8%	1.4%	0.8%	1.0%
Number of events held 1977-1981 (excluding Academy)	37	31	30	98
% distribution	35%	36%	29%	100%
Number of participants in events held during 1977-1981 (excluding Academy)	805	1025	591	2421
% distribution	24%	42%	24%	100%
Participation Rates over four years (1977-1981)	3.0%	3.3%	1.7%	2.6%

TABLE 3-19a

CANADIAN CONFERENCE OF TEAMSTERS

Educational Programs by Topic, Region and Year

A. For Years I and II (1977-78 and 1978-79)

Topic of Course	National Office	Eastern Region	Ontario Region	Western Region	TOTALS Years I & II (1977 - 79)
	(numbers of participants/numbers of events)				
Collective Bargaining	-----	-----	-----	3/ 3	3/ 3
Communication	-----	1/ 1	-----	-----	1/ 1
Conditions of Work	-----	-----	-----	-----	-----
Health & Safety	-----	-----	225/ 2	-----	225/ 2
History of the Labour Movement	-----	-----	-----	-----	-----
International Scene	14/ 1	-----	-----	-----	14/ 1
Labour Legislation	-----	80/ 3	-----	88/ 4	168/ 7
Labour's Role in the Community	-----	-----	-----	-----	-----
Social, Political & Economic Affairs	-----	-----	-----	-----	-----
Training and Education	-----	246/ 9	127/ 4	90/ 3	463/16
Welfare Programs	-----	-----	-----	-----	-----
Other	-----	-----	-----	-----	-----
TOTALS	14/ 1	327/13	352/ 6	181/10	874/30

Note: The majority of Training and Education programs comprise training for Shop Stewards. These seminars cover more than one topic such as: Collective Bargaining, Labour Legislation, Health & Safety, and Conditions of Work.

TABLE 3-19b

CANADIAN CONFERENCE OF TEAMSTERS

Educational Programs by Topic, Region and Year

B. For Years III and IV (1979-80 and 1980-81)

Topic of Course	National Office	Eastern Region	Ontario Region	Western Region	TOTALS Years III & IV (1979 - 81)
	(numbers of participants/numbers of events)				
Collective Bargaining	-----	-----	34/ 4	36/ 4	70/ 8
Communication	-----	-----	-----	6/ 2	6/ 2
Conditions of Work	-----	35/ 1	-----	-----	35/ 1
Health & Safety	-----	25/ 1	111/ 2	-----	136/ 3
History of the Labour Movement	-----	-----	-----	-----	-----
International Scene	26/ 1	-----	-----	-----	26/ 1
Labour Legislation	-----	3/ 3	4/ 4	-----	7/ 7
Labour's Role in the Community	-----	-----	-----	-----	-----
Social, Political & Economic Affairs	-----	25/ 1	-----	1/ 1	26/ 2
Training and Education	-----	390/18	524/15	367/13	1281/46
Welfare Programs	-----	-----	-----	-----	-----
Other	-----	-----	-----	-----	-----
TOTALS	26/ 1	478/24	673/25	410/20	1587/70

TABLE 3-20

CANADIAN CONFERENCE OF TEAMSTERS

Expenditures for Labour Education over Four Years
(Years I - IV: 1977 - 1981)

Expense Item	Year I (1977-78) $ amount	%	Year II (1978-79) $ amount	%	Year III (1979-80) $ amount	%	Year IV (1980-81) $ amount	%	TOTALS $ Amount	%
Direct Expenses from Learning Activities:										
Courses & Seminars	$ 2,600	(17.1)	$ 14,476	(16.4)	$ 22,104	(19.4)	$ 31,899	(28.0)	$ 71,079	(21.4)
Teamster Academy	-----		10,504	(11.9)	22,873	(20.0)	2,627	(2.3)	36,004	(11.0)
Payments to locals	2,897	(19.1)	2,448	(2.8)	10,639	(9.3)	8,315	(7.3)	24,299	(7.3)
Personnel	1,261	(8.3)	22,853	(25.9)	34,060	(29.8)	51,997	(45.6)	110,171	(33.2)
Administration	2,290	(15.1)	8,941	(10.1)	12,038	(10.6)	9,916	(8.7)	33,185	(9.9)
Expenditures for Program Development:										
Equipment	397	(2.6)	28,985	(32.9)	1,170	(1.0)	232	(0.2)	30,784	(9.3)
Productions and Publications	-----		-----		9,106	(8.0)	3,045	(2.7)	12,151	(3.7)
Library	-----		-----		2,187	(1.9)	6,000	(5.2)	8,187	(2.5)
Subtotals	$ 9,445		$ 88,207		$ 114,177		$ 114,031		$ 325,410	
Transfer to Chemical Workers	5,750	(37.8)	-----		-----		-----		5,750	(1.7)
TOTALS	$ 15,195	(100%)	$ 88,207	(100%)	$ 114,177	(100%)	$ 114,031	(100%)	$ 331,160	(100%)
TOTAL FEDERAL GRANTS (for program year)	$ 75,000		$ 81,600		$ 89,108		$ 97,396		$ 343,104	
Surplus/(deficit)	$ 59,805		$ (6,607)		$ (25,069)		$ (16,635)		$ 11,494	
Cost per person-day	$ 10.64		$ 113.09		$ 76.47		$ 88.81		$ 77.02	

FIGURE 3-p

CANADIAN CONFERENCE OF TEAMSTERS - Comparison of Various Statistics

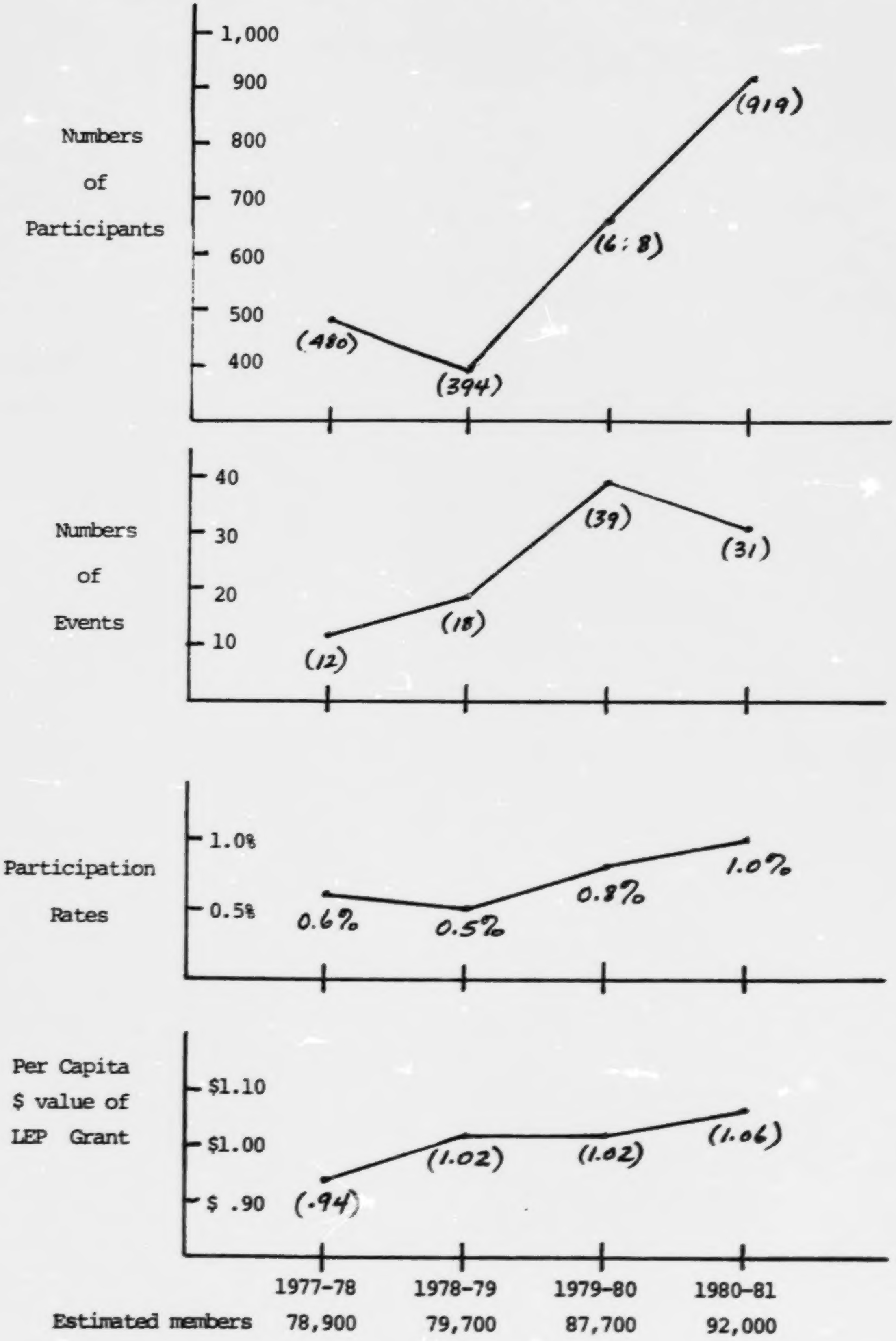


FIGURE 3-q

CANADIAN CONFERENCE OF TEAMSTERS

Segment of Membership Being Served

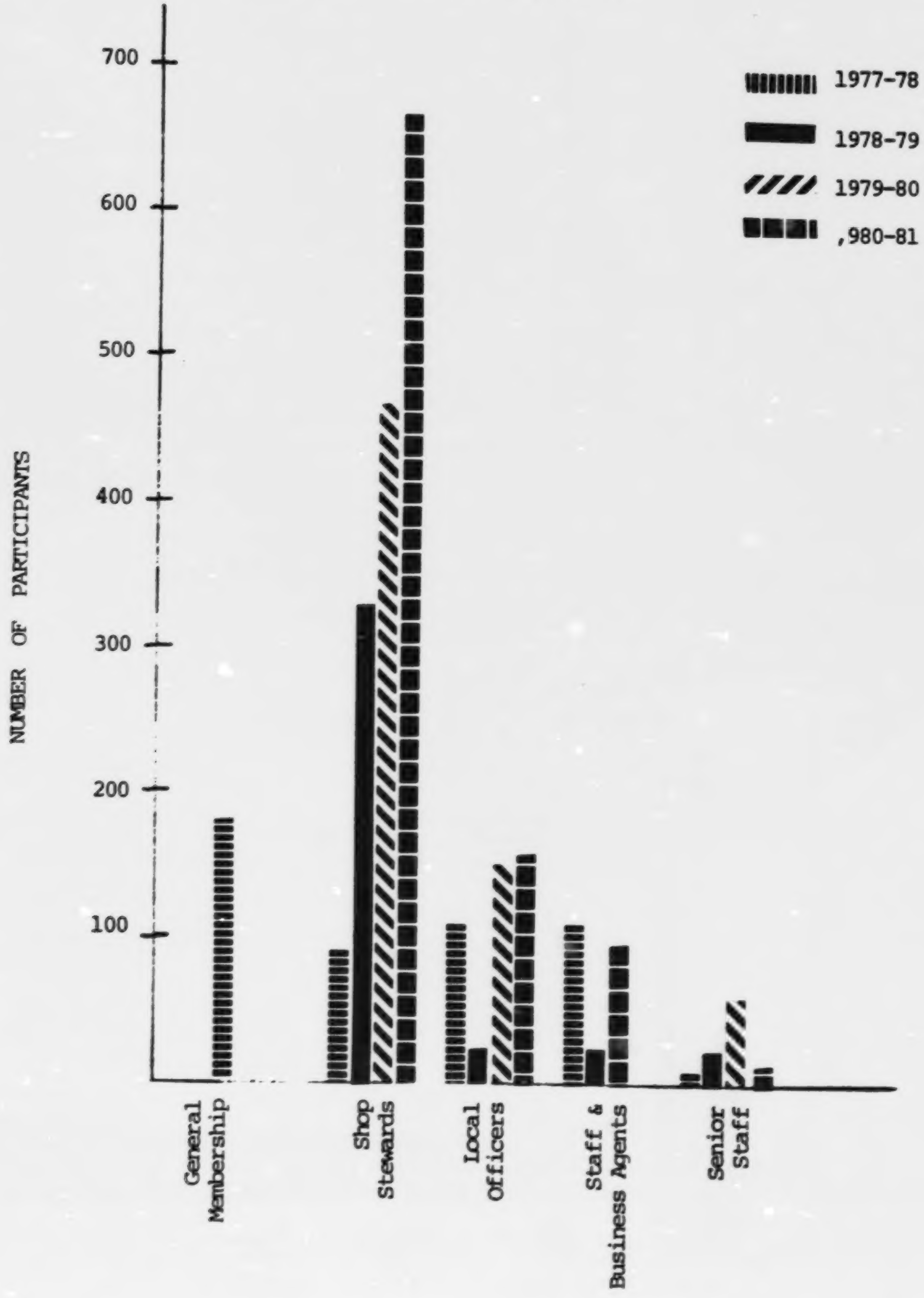


FIGURE 3-r

CANADIAN CONFERENCE OF TEAMSTERS - Type of Event

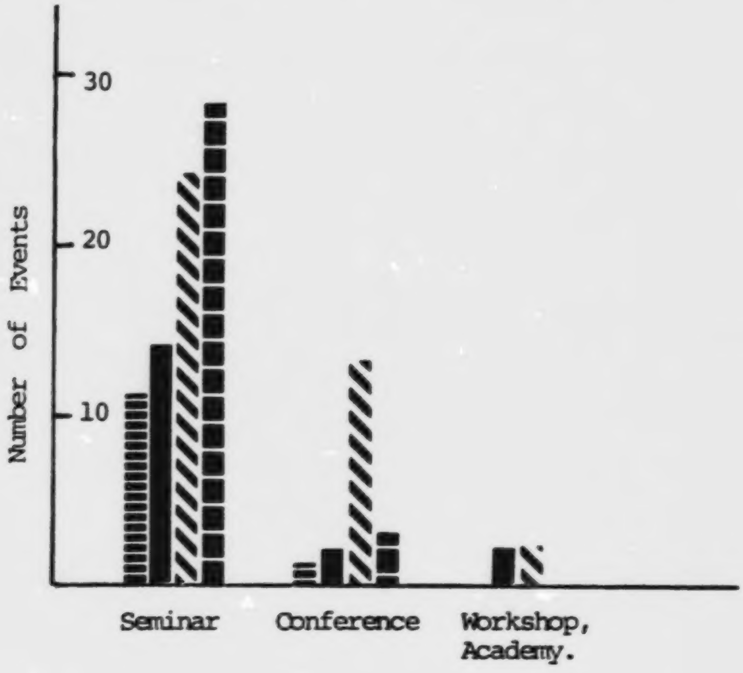


FIGURE 3-s

CANADIAN CONFERENCE OF TEAMSTERS - Duration of Event

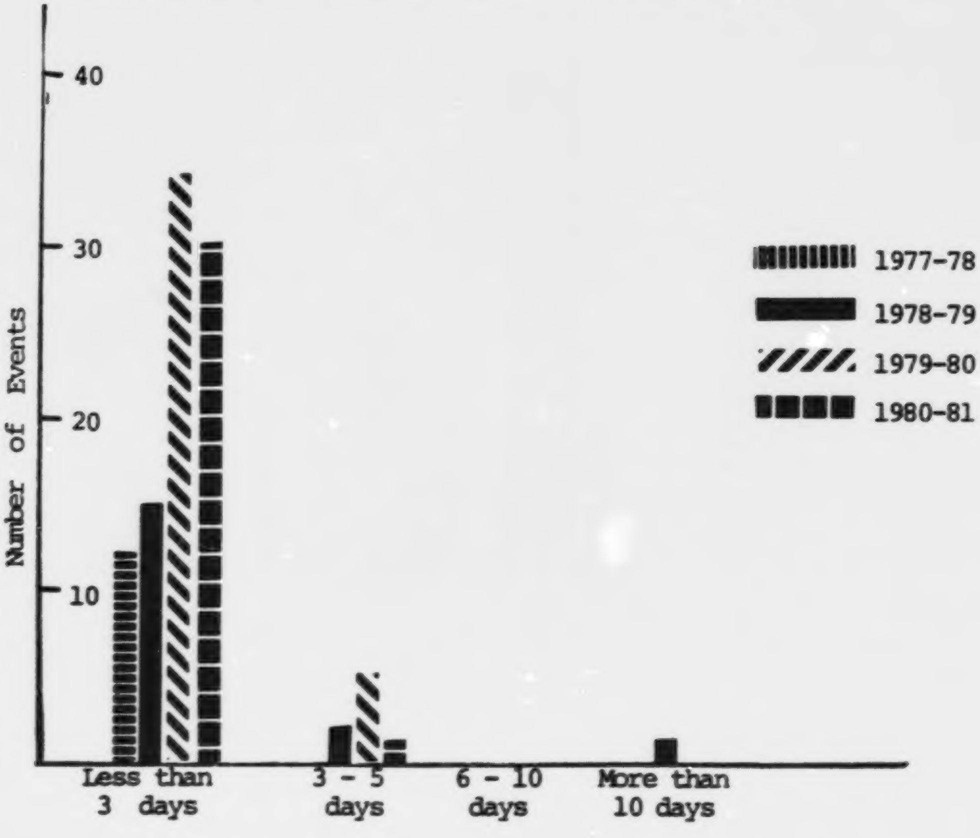
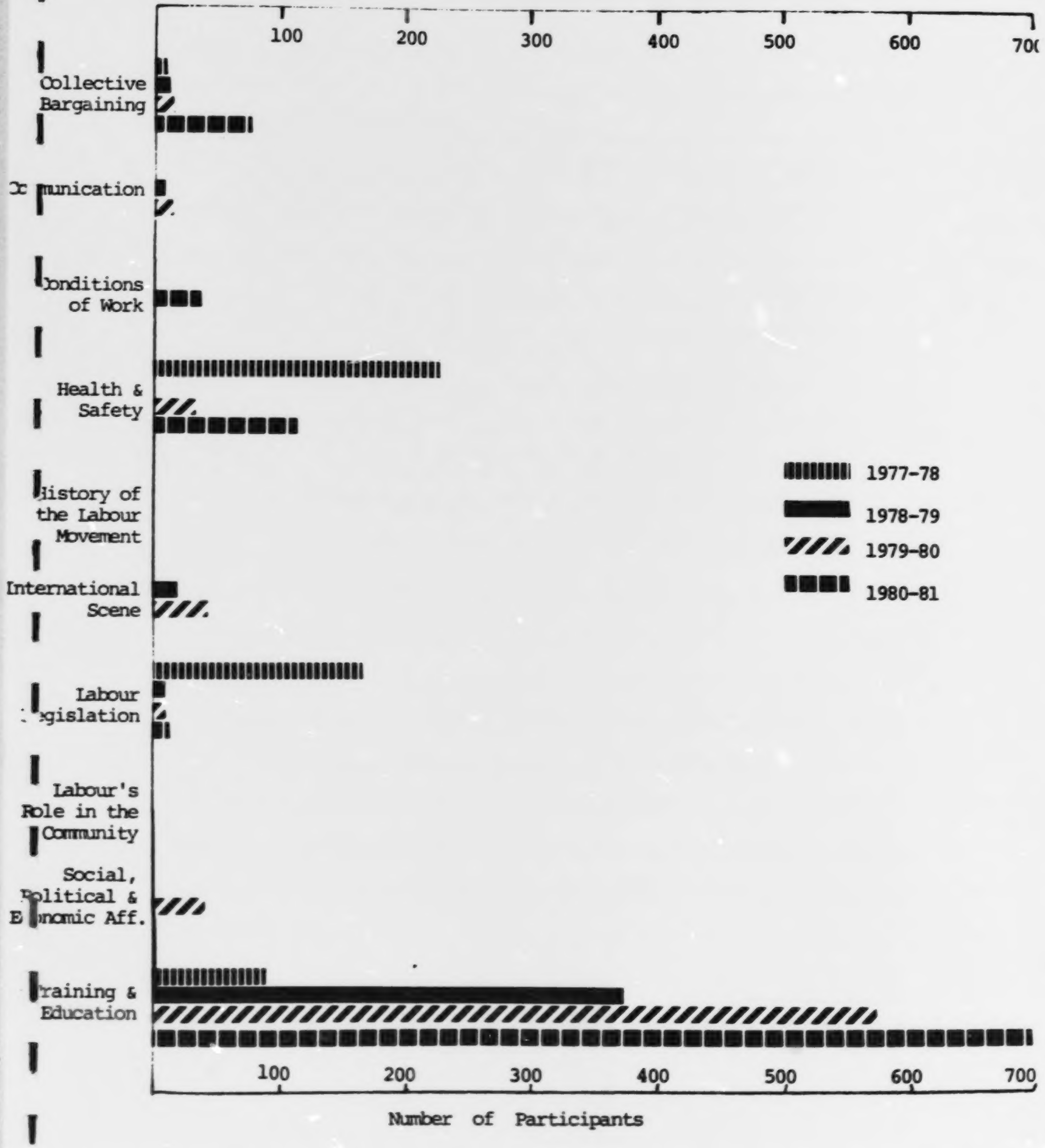


FIGURE 3-t

CANADIAN CONFERENCE OF TEAMSTERS

Range of Topics and Frequency of Participation



Section 4: The Canadian Labour Congress

4.1 Terms of the Contract with Labour Canada

The Federal Government initiated the LEP by signing a five-year contract with the Canadian Labour Congress in May 1977. The principal provisions of the contract included:[8]

> "that the Canadian Labour Congress will establish a National Labour Studies Centre and five regional Labour Study Centres, and specific programs and educational projects necessary for the conduct of a labour educational program, in accordance with the provision of the Agreement." (Section 2:2)
>
> "The function of which will be to enable officers, officials and potential labour leaders of the Congress and its affiliates to acquire a comprehensive knowledge and understanding of the goals, policies and responsibilities of the Canadian Labour Movement and of the Congress, in the context of the economic, political and social framework of Canada, and knowledge and skills necessary for the discharge of their duties in the Labour Movement." (Section 3:1)
>
> "Subject to the provision of subsections (7) and (8), the total contribution of her Majesty in respect to each of the program years shall be two million ($2,000,000.00), augmented for each program year after the first by an inflation factor determined by application of the Consumer Price Index for the previous fiscal year." (Section 5:1)

By the end of the fourth program year, June 30, 1981, the total financial contribution of the Federal Government to the Congress amounted to $9,885,332. This sum did not include any federal support to the ARLEC program in the first year as this program as funded, at that time, by the Department of Regional Economic Expansion.

The contract with the Congress was the first experiment with providing support for the accomplishment of broad educational goals through making funds available to a representative group of users as opposed to a providing agency. The significance attached to the implementation of such a policy is indicated by the fact that the agreement with the Congress represents 78.9% of the total expenditures in the first four years of the Labour Education Program. The practical effect of the contract was the creation by the Congress of a new type of educational providing agency.

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[8] Agreement between the Minister of Labour and the Canadian Labour Congress (File No. 690-3-5) op. cit., 1977.

The Congress was initially faced with a series of decisions which could be defined as choices between making or buying educational services and resources. The Congress could have chosen to turn to various existing educational agencies, with expertise in providing specialized courses and materials; but elected instead to develop the necessary expertise and organizational structures to meet its own unique needs for educational servies and resources. The established tradition in Canadian labour was that labour education should be controlled by the labour movement itself. The decision to accept large scale assistance from the Federal Government was only taken on the strength of the no-strings policy. The Congress chose to make its own educational system, drawing on external resources only for those few human and technical resources which it could not immediately supply from existing resources within the Congress or its affiliates. This decision was consistent with the terms of the agreement with Labour Canada which called for the establishment of a National Labour Studies Centre to be separate in organization, administration, and financial management from existing educational services in the Congress.

4.2 Organization: Background

As of 1980-81, the Congress was composed of 190 labour organizations (see Table 3-3), representing approximately 2,370,000 members or 68% of the organized labour force in Canada and 36% of labour organizations. Half of these organizations are affiliated national and international unions. The other half of the labour organizations associated with the Congress are small directly chartered local unions.

The affiliates range in size--the largest being the Canadian Union of Public Employees with 267,400 members and 1,629 locals and the smallest being the International Association of Siderographers with four members and one local. Only about 30 affiliates have fewer than 2,500 members. Table 3-21 lists labour organizations with memberships in excess of 50,000 and shows their relative rank ordering for both 1978 and 1981. Table 3-21 also indicates changes in membership levels within the large labour organizations, as well as changes based on amalgamations among previously separate affiliates. The creation of the Service Employees International Union, for example, amalgamated fourteen affiliates into one; while the creation of the National Union of Provincial Government Employees amalgamated nine affiliates into one. Since 1981, a split has occurred between the Congress and the fourteen labour organizations representing workers in the building trades. It is not clear how this split will affect the labour education programs of the Congress and the LESC.

Not only do affiliates differ in size, they also differ in history, structures, philosophy and social and political commitment. Additional differences among affiliates are determined by the extent to which any labour organization represents mostly French or English-speaking members. Many affiliates have locals in Quebec, representing over 320,000 members, the majority of whom are French-speaking. The affiliates in Quebec are represented on the Fédération des travailleurs du Québec (QFL) and an early decision by the Congress was to provide educational services in Quebec through the QFL. Funds to support these educational activities are provided to the QFL by the Congress as a direct grant from the federal contract monies. Educational activities supported by LEP funds in Quebec have been dealt with in a separate report by Julio Fernandez, entitled "Le programme d'aide financière a l'éducation ouvrière au Québec: Évaluation finale", (Université de Montréal, Faculté de l'éducation permanente, Bureau de la recherche, 1982).

Most of the directly chartered local unions have fewer than 1,000 members. Many of these organizations represent bank workers in very small local organizations. Educational services to the directly chartered unions are provided in the same way as are educational services to the large affiliates. None of the directly chartered unions have educational officers, but the bank workers are loosely associated through an organizing committee within the Congress, and some educational services are provided through this committee.

The labour organizations affiliated with the Congress are fundamentally democratic orgaizations. Principal leadership functions are performed by elected officers, all of whom are subject to the vagaries of democracy. There is constant change in the incumbents of all elected positions. In addition, the steady growth of organized labour in Canada and the influx of large numbers of young persons into the work force over the past decade have placed increasing demands on the educational resources available. While young members often possess more years of formal schooling than the original membership of labour organizations and may be more inclined to accept participation in educational activities as a normal part of working life, they are also basically uninformed with respect to the history and philosophy of the labour movement in general and their own organizations in particular. Young members may also be unskilled in the functions, activities and individual responsibilities required for the operation of a labour organization.

In a relatively short period of time, beginning in the late 1940's and early 50's, the labour movement in Canada has developed a large and complex national structure with affiliations, provincial federations, local councils, standing committees, conventions and so on. An increasng number of Canadian citizens are acquiring their basic organizational skills and political experiences within the labour movement.

The Congress has a long history of involvement in education, both within the organization and through relationships with various external agencies. Prior to the signing of the LEP contract in 1977, there had been cooperation between the Congress and the Federal Government in such undertakings as the Labour College of Canada, programs for labour leaders from developing countries through the Canadian International Development Association, and the Atlantic Region Labour Education Centre which was originally funded by the Department of Regional Economic Expansion and provided a financial model for the present agreement.

At the time the agreement was initiated, one of the differences among the affiliates was the degree to which each was committed to education. In 1974, Verner and Dickinson, in a study undertaken for the Congress,[9] observed that only the large affiliates had full-time educational staff and substantial programs. Many small affiliates had no educational programs at all.

By 1977, approximately 30 of the 98 affiliates, representing roughly 1.3 million members or 60% of the Congress' membership, had some form of educational program. Most provincial federations, some local councils, and some large locals also had educational programs, and some provincial federations had educational staff members. At the time the agreement was signed, the budget for educational services within the Congress was approximately $400,000. By the end of the fourth year of the LEP, the budget for educational services had risen to over $530,000. In addition, some services provided by the Congress, while specially identified as such, are educational in nature (e.g. International Affairs, Social and Community Services).

Among the affiliates, a similar expansion and increased investment appears to have taken place. For example, Table 3-25 indicates that, while the large affiliates are most frequently represented at educational events, some of the smaller affiliates are also active. Noteworthy examples are the Brotherhood of Railway, Airline and Steamship clerks, and the Canadian Brotherhood of Railway, Transport and General Workers. We have had verbal reports that the large affiliates have increased expenditures on educational activities over the four years of the LEP, although we were unable to document this assertion. Reports of cooperative educational activities between the Labour Education and Studies Centre and affiliated orgaizations would tend to support the assertion.

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[9] Verner and Dickinson, op. cit., 1974.

Evidence of achievement of any or all of the objectives of the Federal Government's investment in labour education through the LEP, must be sought in terms which are accepted by the majority of those pursuing those achievements. We have chosen to look at educational activities and resources, the supporting organizational structures, and the outcomes of these endeavours as the chief indicators that objectives have been met. We have taken the position that the outcomes of learning activities must be the final measure of achievement in relation to the first three objectives (see Chapter 3, Section 1.3). Evidence related to learning outcomes has been presented in Chapters 1 and 2. In addition, the agreement itself represents a conviction that desirable learning outcomes are more likely to be achieved if the administrative structures and educational activities described in the agreement are undertaken. Further, the fact that participation is fundamentally voluntary lends weight to the argument that if such activities exist and there is evidence of participation in them, then the desired learning will probably take place.

We have assumed that if the Congress has been actively pursuing the objectives of the LEP with some degree of success, then we would expect to find the following evidence:

a) that educational expenditures by the Congress and its affiliates, exclusive of the Federal Government's contribution, have not been reduced during the period in question and have increased;

b) that the organizational structure proposed by the Congress and detailed in the agreement, or some rational alternative, h s been developed and will be operational;

c) that financial arrangements sufficient to permit the organizational structure to function adequately are in place;

d) that a reasonably broad range of opportunities for participation in labour education are available to all members of the Congress in all parts of Canada;

e) that new programs have been and are being developed and introduced;

f) that increased participation by labour organizations, as well as by individual members, has taken place;

g) that a growing articulation between programs offered by large affiliates, the educational services of the Congress and the Labour Education and Studies Centre is being developed;

h) that attention has been paid to the quality of both existing and new courses with an emphasis on the preparation of high quality learning resources and on the systematic development of skilled instructors;

i) that there are indicators that the learning acquired through participation in the programs is being transferred to the exercise of functions in the labour organizations; and

j) that relationships between Labour Canada and the labour movement, as represented by the Congress, will have improved and will be constructive.

4.3 Organization: The Labour Education and Studies Centre

The decision of the Congress, which was written into the agreement with the Federal Government, was to separate the federal LEP funds, financially and programmatically. This decision necessitated the creation of a new organizational structure, the Labour Education and Studies Centre (LESC), which would operate within the Congress but independently of the existing educational services of the Congress. The bulk of the first year's activities went into the development of this orgaizational structure and into the procurement of technical resources for the operation of a national program centre.

A Board of Directors met for the first time in June 1977. A National Director was appointed in July and offices were rented, renovated and in use by August 1977. At its second meeting in August, 1977, the Board of Directors established the National Coordinating Committee to exercise executive authority between meetings of the Board. By January, 1978, all regional organizations, including advisory committees, were in place. In most cases, these were entirely new committees, although the National Advisory Committee was largely composed of the Congress' already existing standing committee on education. In Ontario, the Educational Committee of the Ontario Federation of Labour became responsible for providing advice to the Ontario Region LESC.

In April, 1978, an agreement was reached with St. Francis Xavier University transferring the supervison of ARLEC to the Board of Directors of the Atlantic Region LESC. Figure 3-u provides a visual display of the existing organizational structure with its linkages to the Congress, provincial federations of labour and other labour organizations. At the centre of the new structure is the National Coordinating Committee which meets approximately six times each year. All decisions of this committee are ratified by the Board of Directors of the LESC which meets twice each year. Decisions include: appointments to all Regional Boards and Advisory Committees; authorization of national and regional expenditures; supervision of national and regional employees of the LESC; and the development and execution of national policy. With the exception of the Quebec region, official relationships between the National Board and the Regional Boards take place at the staff level. There is some overlap between regional and national participants on advisory committees.

Regional Boards have met twice yearly, more frequently at the outset of the Program. The Advisory Committees tend to meet more frequently. For example, the Pacific Regional Advisory Committee meets monthly.

The LESC structure has two major tasks. At the national level, it must provide for the systematic production of programs and program materials and must make these available throughout Canada and within an organizational environment of some complexity. The National LESC is responsible for developing, testing, revising, producing and distributing programs and materials. The Regional LESCs are responsible for implementing programs, obtaining high quality instructors, assessing program outcomes, and reporting back on regional needs and demands for new programs and materials. The second major task of the LESC is to be responsive to changing needs and demands for programs and program materials and to be sensitive to the varieties of experiences which these programs and materials produce and to the quality of the learning outcomes.

One test of effectiveness of any administrative structure is the degree to which it can survive changes in senior personnel with minimal disruption. Since the creation of the Labour Education and Studies Centres, two senior officers--the Director of Education for the Congress and the Director of the LESC--have departed and been replaced. There have also been changes in the membership in various boards. At the same time, the functions of the national LESC have evolved from direct involvement in programming to greater emphasis on cooperative and supportive aspects of program and resource development. The administrative structure originally established seems to be functioning effectively in spite of these changes.

In particular, improvements have been made with respect to the complicated relationships which originally existed between the LESC and Congress educational programs in the Atlantic Region and the Atlantic Region Labour Education Centre (ARLEC). During the third and fourth years of the LEP, the relationship between the regional board of the Atlantic LESC and the board of ARLEC has been strengthened and formalized so that a maximum overlap now exists between the two bodies. Some coordinated planning is emerging and proposals are being considered for the development of a logical sequence of educational activities. This would begin with an individual's attendance at weekend courses sponsored by the Congress and the provincial Federations of Labour; move to attendance at the level one, week-long program at ARLEC; then to week-long schools offered by the Atlantic LESC; and culminate in attendance at the Labour College.

The evaluation report on ARLEC by A.E. Hepworth[10] stresses the need for careful coordination and liaison between the various interests in labour education in the Atlantic Region (see pages 127-131 of Hepworth Report). Recommendations include more frequent meetings of the board; a clearer job description and more effective supervision for the coordinator of the Centre; and much improved information for students and participating organizations. A committee has been struck to examine and plan steps toward the implementation of the recommendations in the Hepworth Report. The following recommendations should therefore be regarded as encouragement to the Congress to continue these activities.

Recommendation: The Congress should proceed to implement the bulk of the recommendations contained in the "Report on an Evaluation of the Atlantic Region Labour Education Centre: March 1972 to February 1981". We believe that this report presents a fair, accurate and thoroughly competent evaluation and is deserving of the most serious consideration.

Recommendation: Since there is no program similar to ARLEC in any other regions, the Congress should, on the basis of the existing evaluations, explore the value of establishing a comparable program in other regions, including similar relationships with post-secondary educational institutions.

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[10] A.E. Hepworth, "Report of an Evaluation of the Atlantic Region Labour Educational Centre: March 1972 - February 1981" (Parts One and Two). A report prepared for the Board of Directors of ARLEC, 1981.

There appear to be some strains with respect to the relationship between the Pacific LESC and the national office, indicated in part by the fact that information on attendance and financing is collected and reported on a different basis by this region when compared to other regions. This issue will be considered in a later section.

The straight transfer of funds to the Quebec Federation of Labour and the special administrative arrangements relating to that program, plus the special problems being resolved in other regions, are examples of how the Congress is attempting to reduce the stress of operating regional programs within a national organization. The degree to which the national office of the LESC is slowly altering its functions and relationships with the programming units in the regions is a measure of the intention of the Congress to address these problems.

4.4 Staffing

The four years during which the LESC has been in existence has provoked some concerns about staffing. The LESCs cannot survive without staff who are competent in the areas of educational program and resource development and who have experience in and devotion to the labour movement. The combined national and regional staff now number 14. So far, the recruitment of capable staff has proceeded as planned and opportunities to improve skills and knowledge have been offered to staff members. A different issue, one which may arise in the near future, relates to the current inability of the Congress and the LESC to provide opportunities for advancement within the educational field to its various staff members. These individuals are currently developing expertise and personal resources which might benefit other organizations. However, their future as educators is unclear. There are minimal opportunities for them within the formal educational system and other types of opportunities remain undefined at this time. The problem is one which is shared by the labour movement in other countries and by educators within non-educational organizations everywhere. Alternatives do exist, such as three- to five-year rotation plans among organizations and between educational and non-educational positions within organizations. The officers of the Congress and the staff of the LESC would be wise to review this future issue within the next year or two.

Recommendation: The Congress should examine its policies for staffing educational positions, particularly within the LESC, to improve long-range opportunities. Comparable experience in other organizations, both in Canada and abroad, might be examined with special attention being given to the development of a system of staff rotation over fixed periods of time.

4.5 Participation

In all voluntary programs of adult education, the quality, type and level of participation is a critical factor. The LEP, in all its activities, is a program of voluntary participation. It is of importance to be able to describe who participates because it is from these individuals that the sample was drawn for our interviews reported in Chapters 1 and 2. Detailed information, despite recent innovations in information collecting procedures, remains sketchy. In the absence of complete information (see Section 4.9 on Internal Evaluation), we have attempted to draw on data from sample events (see Tables 3-25). These events include: the summary of data on two Labour Schools (Ontario Region), data from the evaluation reports on ARLEC and the 1981 Winter School at Harrison Hot Springs,[11] and data from the Labour College.[12] Whenever possible, we have tried to organize this information to conform to the categories which are used by Labour Canada. While these categories do not necessarily correspond to those used by the Congress and the LESC, the standardizing of categories within this report makes some comparisons possible.

The picture which emerges suggests that a very small proportion of the total membership of the Congress actually participates in LESC activities and that the range of topics and events tends to remain relatively stable over the four years of the program. If we could consider participants as a proportion of elected officers and staff members of the affiliates and directly chartered unions, the percentage would be considerably greater. However, we have no basic information on which to calculate participation rates among officers and staff, and our comments therefore can only reflect on participation among the total membership of the Congress.

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[11] J. Mastai, "CLC Winter School Evaluation: Summary of Findings". A preliminary report prepared for the Labour Education and Studies Centre, Pacific Region, 1981.

[12] J. Bezusky, "Labour College of Canada: Report of the 1979, 1980, and 1981 Sessions". Mimeographed reports available from the Labour College of Canada, Ottawa.

a. Affiliated Organizations

Table 3-21 indicates that ten of the very large affiliates of the Congress have education officers. In addition, eight smaller affiliates, six provincial federations of labour, and seven of the government associations which are members of the National Union of Provincial Government Employees have education officers. The existence of an education officer suggests that the organization involved maintains a commitment to education and that individual members within these organizations are likely to benefit from programs offered internally as well as from participation in LESC programs. Table 3-25 bears out this assumption. This table offers a summary of the characteristics of individual participants and a listing of the labour organizations with the highest levels of participation in selected educational events held during 1981. While these figures are by no means a reflection of the overall program offered by the Congress, the list of active affiliates does indicate that those with education officers are more likely to send participants than those without. Furthermore, the general indications are that participation is very much a function of geographical proximity to the area where the event is located. For example, members of Ontario government unions do not attend events in British Columbia; members of the two paperworkers unions were frequent participants in the Thunder Bay School while members of the woodworkers were more predominant in the B.C. School. In addition, while the large affiliates are more likely to send members to attend programs, in proportion to their actual memberships, the large affiliates are under-represented in Congress activities.

The educational authorities of the Congress have concentrated on increasing participation from smaller organizations and have reported considerable success. For example, the conditions for attendance at the Thunder Bay School were that a proportion of the participants were to be first-time attenders or to have previously participated in only one or two weekend events. While Table 3-25 shows that 77% of participants at the Thunder Bay School had previously attended labour education events, over half of these had attended only one weekend event. The same conditions were not imposed on the Port Elgin School and over half of the participants had previously attended three or more week-long events.

The records provided by the LESC on participation among the affiliated unions indicates that 22 have never participated in educational activities and that the majority of these have memberships ranging between 200 and 2,000 members. We can conclude therefore, that the same problem occurs within the CLC as was found among the independent labour organizations: that it, in terms of reaching its membership across Canada and of providing for highly-diversified orgaizations within that membership, the internal problems of the Congress resemble those existing between Labour Canada and the independent labour organizations. The primary problem is one of equity in the access to federal funds, both on the part of individuals and of different labour organizations.

Additional information from the LESC indicates that the rate of participation from directly chartered local unions appears to be low, although the Pacific Region provides educational events specifically for the Fruit and Vegetable Workers' Union.

Recommendation: The Congress should review rates of participation by members and officers of affiliated organizations and directly chartered local unions, with a view to encouraging increased participation from small organizations, particularly those without education officers.

b. Individual Members

Tables 3-25 and 3-26, and Figures 3-v and 3-w provide information on overall participation by individuals for the four years of the program and on participation by topic and region. The total number of participants in LESC-sponsored events was approximately 12,000 persons. Although there is no reliable data on the number of repeaters among this number, it is clear from the results of our survey (see Table 2-4) that repeaters are common in week-long events. Participation rates in one year (see Figure 3-w) range from 0.03% in the first year to a high of 0.18% in the third year and back down to 0.15% in the fourth year. These figures do not include the educational activities which are operated by the Congress independently of federal funding, nor the educational activities of the affiliates themselves, the provincial federations of labour, the local labour councils, ARLEC or the Labour College.

Figure 3-v indicates a slight decline in participation in Year IV and an increase in educational events, suggesting a shift to events attended by fewer participants. The LESC is not yet reporting consistent data on the length of courses for all regions and for the national centre. Our best guess, based on existing reports, is that there has been an increase in five-day courses and a slight decrease in one, two or three day events. The overall picture is of fewer participants involved in longer courses with accompanying increases in wage recovery payments and expenditures for food and lodging (see Figure 3-x and Table 3-23).

The information provided in Figures 3-y and 3-z indicates that the number of events and participants in the area of Training and Education has increased steadily over the four year period. The same phenomenon occurs in the data for the Teamsters and the independent labour organizations. Participation rates, therefore, appear to be at least partially a result of the topic involved and the length of time required to deal effectively with that topic. Our experience with educational events suggests that it is easier to handle large numbers of participants in conferences which basically provide information (e.g., in occupational health and safety), and that it is necessary to limit participation in courses focusing on leadership skills, and courses on instructor and steward training in which an instructor must work with individuals on a one-to-one basis or in small group settings.

To examine the characteristics of individual participants in greater detail, we have provided information from several disparate sources on five different types of education events in Table 3-25. The table indicates that the pattern for participation does not vary much from region to region and from event to event. In most events, there are three men for every woman and the majority of participants are between 25 and 45 years of age. Most hold an elected office within their union and the majority have been with their union for longer than six years (the average membership time is about 10 years). Over 90% of all participants in all regions have at least partial secondary school education and many have at least some post-secondary education.

Participation in ARLEC shows two major variations in the general pattern--fewer women and fewer participants with post-secondary education. The ARLEC program was designed to be a basic program of more general interest than the predominant tool courses offered by the LESCs. The Hepworth Report indicates that the ARLEC experience has stimulated a general move toward more learning on the part of graduates. An impressive 91% of those responding to the survey had gone on to take more labour-oriented courses at the Labour College, affiliate programs, weekend institutes, and LESC skills courses; and about half were encouraged to pursue more academic training and to become more highly involved in their communities. Further, 98% of those responding to the survey reported that they had become more active in their union and labour councils, in the NDP and politics, in town councils and other community organizations after attending ARLEC (Hepworth, Part One, pp. 30-53).

Information from the Labour College indicates that participants with 11 or more years of formal schooling have increased from 68% in 1975 to 84% in 1981; and that between 1979 and 1981, those with post-secondary experience increased from 42% to 64% of the student body (see 1981 Report). In the last three years of the Labour College, all regions of the country were represented with the greatest proportion of students coming from Ontario. A French section of the College was offered in each year but no French-speaking students have attended in the past three years. The average age of students was 33 years. The College normally accepts 60 students each year, but in 1981 this number was increased to 64.

The program of the Labour College is comparatively long and intense. Selection of students is more stringent and arrangements to attend the eight-week residential program places somewhat greater demands on individual participants in terms of personal expenses. While every student receives financial assistance from some source, usually his or her own union, and a scholarship from the Labour College, many individuals experience some problems in handling expenses, particularly as these relate to being away from home for extended periods of time. About 13% of the students experienced some difficulty in obtaining leaves of absence from their jobs and only 9% received a full eight weeks of paid educational leave. In spite of additional pressures, only 28% felt they had suffered from a loss of wages. The responses to our telephone survey (Table 2-4) support these views.

Our interview with Jean Bezusky, Associate Registrar of the College, indicates that graduates of the College have an excellent record of participation in elected offices within their union and in filling other leadership roles within the Congress and the provincial federations of labour. In addition, many graduates have moved from being rank-and-file members to being full-time staff members of various affiliates of the Congress. The College records show that many graduates leave their own union to assume paid staff positions in other unions and that the educational staff of the Congress includes a number of Labour College graduates. Our interviews with other persons involved in the Labour College indicates that some individuals do not appear to be utilized by the labour movement in general and that there is some lack of integration of the graduates of the College into other aspects of the Congress's educational activities.

Three outstanding issues with respect to individual participation in educational programs remain: opportunities for the education of senior leaders in the educational programs, the selection of participants, and the quality and quantity of advance information about educational events.

While the first two years of the Congress program showed both impressive promise and some actuality in providing educational activities for the first levels of leadership in the affiliates and that this was appropriate, there seemed to be a lack of comparable educational opportunities for the senior leaders of both the affiliates and the Congress. We recognize that they are very busy people and that their superior access to information and the casual interactions with leaders both inside and outside the labour movement reduces the necessity for their participation in large parts of the existing educational endeavours. We are convinced that committee meetings and other business exchanges are not adequate substitutes for well-planned educational opportunities which meet the learning and developmental needs of officers and staff members. It can be argued that as the educational program within the Congress matures, officers and staff in the lower and middle levels of labour management are more likely to participate in educational activities if they perceive that such participation is also an integral part of the activities of senior officers and staff of both the affiliates and the Congress. To our knowldege, only one event was held during the four years under review. This event was a four-day seminar held for senior educational officers of the Congress, the LESCs and the major affiliates. It is planned to hold comparable annual events in the future.

We are aware that these are exceedingly trying times for the leadership of the Congress, and for the labour movement as a whole, and that, in addition to the strenuous demands on their time, it is conceivable that they may regard attention to their own personal learning as an indulgence. However, we are of the opinion that their personal and leadership needs would benefit from some form of learning program, indeed that the benefits would be that much greater and more justifiable given the perplexities which surround them.

In concluding this point, we do acknowledge the apparent increase in participation among first-line leaders in educational programs. It would appear that the utilization of educational opportunities is becoming more and more established within the Congress and its affiliates.

Recommendation: The senior officers of the Canadian Labour Congress, in cooperation with the educational leadership of the Congress, should continue to give attention to the need for developing planned educational opportunities for the senior leaders of the Congress.

Selection of participants and adequate advance information are linked problems. We have pointed out that the total participation by individuals represents a very small proportion of the membership of the Congress. This comparison may be unfair, since only a limited proportion of members of any labour organization wish to become or will become occupants of leadership positions. The educational program is generally designed to maximize the abilities of the occupants of positions of leadership, and a fairer rate of participation would be calculated against the existing numbers of leaders. Evidence suggests that the vast bulk of education takes place after an individual has attained such a position.

However, there is another side to this issue. Labour organizations are democratic political organizations, and, as such, it is of the highest importance to their well-being that they attract new individuals, new skills, and new points of view to the elected leadership positions. Therefore, the educational program must continue to try to provide opportunities for potential leaders by making educational activities available to the general membership of labour organizations. If the educational programs fail to do this and if success in the educational program becomes closely aligned with political success in the organization, then the Congress will repeat the patterns which exist in the general society in which a well-educated elite is created. At the present stage in the development of the Congress educational program, some evidence of large scale stresses are emerging. A small number of individuals have engaged in educational programs and there is considrable evidence, from various educational reports, and from our own survey, that these individuals wish to participate more, to develop through educational participation, and to move ahead to more advanced levels of study. To provide for these needs the LESC has had to address such educational trends as sequencing programs from beginner to advanced levels;

establishing pre-requisites of various types; developing information files on individual performance; and surreptitious grading or evaluating of individuals. So far, the LESC has resisted all of these except the issue of sequencing various levels of program topics. However, without very careful attention, the LESC is a prime candidate for all of the characteristic afflictions of the formal educational system.

Such educational trends run counter to the basically political grounds on which local units select candidates for office as well as for attendance at various educational activities. Our use of the term political implies no connotation of such negative factors as personal favouritism, political rivalry, and the indulgences of office, although these may exist. Rather, we are reflecting the fact that the Congress and its affiliates are political organizations and political factors will influence choices of all types, particularly at the local level. In our conversations with various officers in the Congress, it became apparent to us that, in the selection of participants, conflicts are developing between reliance on political factors at the local level and concern for educational factors at the educational programming level. We believe that both sets of factors for selection of participants currently exist within the Congress and its affiliates and that each set has its own virtue. The political factors for the selection of participants at the local level may, to an important degree, counter the development of an educational elite within the Congress, an unintended outcome when educational factors alone are used as grounds for selecting participants.

Recommendation: The Congress should identify problems associated with the selection of participants. To this end, the Congress might give consideration to the formation of a group of both educational and non-educational members to explore the implications of various types of selection factors.

No issue presents itself more frequently nor more clearly in all the information available to us, than that of the quality of information which is made available to participants and prospective participants prior to their attendance at any educational event. There is at present no effective sequencing of educational activities through which a prospective participant might learn about further courses; no clearly-defined statements of course objectives, style of presentation, and expectations about participant performance; and very little advance study materials. Respondents in our survey cited the following as obstacles to effective participation: the lack of information which might facilitate the selection of participants at the local level, the lack of materials for advance preparation, and the lack of a statement of expectations about participant performance which might allow prospective students to decide whether or not they could participate effectively in any given course. Much of the available information is word-of-mouth advice from previous participants and recommendations from supervisors, based on interpretations of sparsely-worded course descriptions provided by the LESC (see examples provided in Appendix S). These course descriptions tend to make use of educational jargon which might be incomprehensible to local officers. To state that a course is "student-centred" may mean very little to the local executive attempting to decide whether or not to send a steward to a five-day course in Steward Training.

The course descriptions and advertising brochures have been part of attempts to remedy the problem of information dissemination. In addition, the growing availability of relatively uniform study materials, developed and distributed nationally, will reduce this problem. However, increased attention to the practices associated with creating and distributing advance information is necessary. The Congress cannot afford to be naive about how difficult it is to distribute adequate information among its members.

Recommendation: The Congress should address itself to the problem of providing adequate information to all locals, all affiliates and all prospective participants in advance of educational events.

4.6 Programs

a. Existing Programs

The assessment of the LESC's educational programs which follows is not compared to other educational programs. Some comparison is possible when we examine Canadian programs in relation to those in other countries (see Chapter 6). We have restricted our conclusions to the evidence which suggests that the educational needs of individuals and organizations are being met and effective programming decisions are being made.

Table 3-26, Figures 3-y, 3-z, and 3-aa provide us with basic information about the LESC's program over the four years of the LEP. (Comparative information is provided in Figures 3-i and 3-h for the independent labour organizations, and Table 3-19 and Figure 3-t for the Teamsters.) We must acknowledge that the LEP, with its associated reporting procedures, has made it possible to amass this range of information for the first time in Canada. We are unaware of the availability of similar information about other educational programs in non-educational sectors, such as Management Training in Business and Industry.

We have already remarked on the high degree of similarity between the three sets of data being considered in terms of the range of topics, the frequency of events offered and levels of participation in each topic area. In addition, there are some differences of importance. Collective Bargaining is an important topic among the independent labour organizations, less important in the LESC programs, and of minor importance for the Teamsters. This difference can be explained by the fact that the Teamsters purchase these skills when necessary from consultants, and training in this area is largely carried out through the educational programs of the affiliates of the Congress.

Figure 3-w indicates that, while there was a slight decline in events in the fourth year of the Program, the total number of events in the third and fourth years was more than double those offered in the first two years. Figure 3-z indicates that there was a modest increase in the numbers of events offered in most topic areas, and encouraging increases in those topics which we have described as dealing with the culture of trade unionism.

Figures 3-y and 3-z provide complementary pictures of program offerings and participation in various topic areas. The dramatic increase in offerings related to Health and Safety in the second and third years of the Program would appear to reflect increased legislative attention to these matters across Canada, and to the practical results of such legislation. In the second and third years, programs in Health and Safety tended to be large conferences at which information about the new legislation was disseminated. In the fourth year, programs in Health and Safety tended to be small group seminars and courses which focused on the skills necessary to make the legislation work. The same pattern is now occurring in areas related to Conditions of Work, in particular to the Quality of Work Life and Equality for Women. This suggests that there is a pattern of programming in which the informing functions of education can involve large numbers of participants, followed by small group activities which focus on the development of skills and strategies related to utilizing information in the most effective and efficient ways; for example, by members of related committees. Our assumption would be that the next step in such a programming sequence would be the examination of ways and means to improve legislation or organizational practices relevant to the topic under consideration. At the same time, local instructors might need to be trained in related areas to assist rank-and-file members to become better informed on the issues and to value the changes involved. All of these program components have occurred in relation to Health and Safety, including the development of a specialized Instructor Training program.

Figures 3-y and 3-z also indicate that the educational staff of the LESC has been persistent in the provision of courses that are not immediately popular with participants but which are valued by the staff as having future application. The existence of activities associated with History of the Labour Movement, Labour's Role in the Community, The International Scene, and Social, Political and Economic Affairs suggests those responsible for making program decisions have attempted to develop a balance between the immediate application of tool courses and the long-range implications of socio-cultural courses. The Congress must now decide how to continue to maintain this balance and introduce advanced level courses in familiar areas, as well as new topics.

Recommendation: The Congress should review, with the mechanism utilized for that purpose, its program planning experiences and decisions of the past five years in order to determine the efficacy of these experiences and decisions and to develop long-range plans for future programming.

b. ARLEC and the Labour College

The programs of both ARLEC and the Labour College have remained relatively stable over the past four years. The ARLEC evaluation comments on the adequacy of the program and instructors and makes several recommendations for change. The major program concern at ARLEC continues to be the Level 2 courses which have not yet emerged as an integral part of a developmental sequence. Attempts to relate the Level 2 program to the correspondence programs provided through the Labour College have not yet been successful.

The idea that ARLEC might become the Labour College East does not seem consistent with the current role played by the Level 1 program.

ARLEC would be wise to abandon the Level 2 program for the time being and concentrate on the benefits to be derived from improving and extending the highly successful Level 1 program.

The Labour College did not operate during 1978, conducting instead an in-depth evaluation of past programs. In the past three years, the College has directed its attention toward greater emphasis on the trade union movement, greater utilization of improved methods for planning integrated courses and facilitating adult learning, reducing class size, extending library resources and providing reading materials for students, and carrying out careful evaluations of all aspects of the program. All evidence indicates that these steps have been both sensible and successful. However, there still remains some concern on the role which the Labour College plays within the context of the overall educational activities of the Congress. Our review of the overall program suggests that the time is fast approaching when the Congress will need to provide for advanced studies, for competent instructors with advanced skills, for programs for senior officers, and for further educational activities for the growing number of graduates of the Labour College. We believe that the issue of an institute for advanced labour studies will present itself again and that the Labour College is the logical nucleus for this development.

Recommendation: The Congress should consider the evolution of an institute or program of advanced studies in Labour Education and should do so using the experiences obtained through the operation of the Labour College and in cooperation with as many other labour organizations as are interested.

c. Residential Programs

One factor which appears regularly in the evaluation reports and personal comments from participants in our survey is the value of holding residential learning programs, even when that residence was for very brief periods of time. Participants in all events of more than two days' duration have indicated that the opportunities for informal discussion and personal interactions are highly valued, and have both short- and long-term outcomes for those involved. The benefits to be gained from residential programs far outweigh the associated increased costs.

d. Instructor Training

Figure 3-aa provides some indication of the emphasis placed on the preparation of competent instructors within the Congress educational program. In the third year of the Program, the emphasis on basic instructor training had reached its zenith. The emphasis then shifted to the training of instructors for specialized programs and to training instructors (advanced) who could, in turn, train other instructors. The history of Instructor Training merits some consideration. In the first two years of the program, the LESC trained sufficient individuals, in national training programs, to meet the immediate needs of the educational programs. In the third year of the program, the political needs of the Congress required that the LESC move to recruiting and training instructors drawn from the regions, locals and affiliates of the Congress. The success of this move prompted a move to dependence on local instructors and led to a decline in basic instructor training. However, to maintain a cadre of competent local instructors, an advanced instructor training program was instituted to train individuals who could then train local instructors.

e. New and Emerging Programs

This move is part of a shift of the activity of the national LESC away from direct involvement in program presentation and toward the development of programs and associated learning materials, and the cooperative production of audio-visual materials and instructional aids. The LESC is already involved in cooperative financing of new materials and cooperative planning of new programs. The priorities are being established by the major affiliates involved. We believe, however, that the LESC should not adopt these new roles to the exclusion of existing roles. The geographical and political nature of Canada supports the withdrawal of national offices from direct involvement in the provision of programs and services and toward indirect involvement through policies, long-range plans, material production, promotion and publicity; while at the same time controlling the regional offices through the purse strings. The model of the formal educational system with its sharp division between curriculum development and direct teaching is not the model which should be adopted by the LESC. Our opinion is that this model is not appropriate, particularly in situations in which student and staff participation is voluntary. Dependence on such a division of educational roles could prove disastrous for the Congress and undo the good work which has marked the development of the LESC to this point.

Recommendation: The Congress should avoid the possible isolation of the national LESC office and its staff from direct involvement in the educational experiences of others, while at the same time encouraging experimentation with new roles and educational activities for the Centre and supporting the personal educational activities of all staff members.

4.7 Resource Development

Adequate, effective instructional materials are the most difficult things to provide when educational programs are new, threadbare, and overwhelmingly subject to immediate demands. Teaching and learning resources tend to be whatever can be found in the files or obtained from another instructor. In earlier years in the Congress's educational programs, supporting materials for students were directly dependent on the student's ability to take notes and on the availability of a photocopying machine. In the past four years, the LESC has devoted itself unremittingly to the slow but steady preparation of basic teaching aids and learning resources, with many successes and a few questionable decisions. Specific materials produced by the LESC are reviewed in Chapter 5.

Most of the basic courses offered by the LESC now have instructor and student manuals which have been carefully planned, well-tested, and revised before final production. New courses and materials are being prepared. A list of these print resources is provided in Table 5-3. At first, the materials which had been produced by the national office were ignored, to some extent, by affiliates and by the instructors and participants in other Congress programs. This situation has changed in the past year. One large affiliate is using the Steward's Manual in its own training program, with supplemental materials for its own members. In addition, LESC materials are finding their way into the Congress educational programs which often run conjointly with LESC programs.

In the first two years of the Program, the LESC was very generous in issuing manuals and binders without charge to participants. This generosity has now been reduced. Cost-sharing arrangements and cost-recovery programs have been developed with the regional offices so that the usage of materials can be maximized and real costs estimated. A new system of inventory control has been introduced which should contribute to the efficient supply of materials and to the maintenance of cost control. Cooperative arrangements with 12 affiliates are underway for the development of teaching materials, particularly audio-visual materials. These efforts extend to planning, financing and potential contributions to the content of the materials. While major achievements have clearly been associated with the production of print materials, we do have some concerns.

First, we had considerable trouble obtaining a complete list of all print and audio-visual materials produced by the LESC. It was often unclear whether the materials were produced by the LESC, were contracted out to a consultant, or were purchased from an external source for use in a LESC-designed program. In some cases we were aware of the existence of materials but not whether or how they were available to potential users. We are aware that the national office is attempting to catalogue all teaching and learning materials and we would encourage them to continue in these efforts. Our concern lies in the lack of information available through regular channels about the educational resources held by the Congress and the LESC. We are aware that these resources are far more extensive than current advertising would indicate.

Second, we had considerable difficulty in calculating the real costs of producing various types of materials. The LESC does not provide cost-accounting for any specific resources but rather includes all labour costs in staff salaries. If print materials sell for $27.50 per set, this reflects only the typesetting and printing costs and does not include labour or supply costs in preparing, testing and revising the materials. This practice reduces the selling price to participants, regional offices and affiliates, but results in difficulties in establishing the real costs of educational materials.

Third, the LESC's original decision to equip a full-scale television production facility now appears to be a problem. While cooperative efforts are underway to co-produce audio-visual materials with the affiliates, such productions can only be accomplished if the affiliates are prepared to go to Ottawa to utilize the production equipment. The equipment is not mobile, yet the programs and the very design of the LESC, suggest that immobilized equipment for any purpose will become a liability as time passes, unless the Congress can find alternative ways to utilize and share the facilities. We recognize that the television studios are now available for rent but we would recommend that the Congress continue to explore ways to make these facilities more accessible to other labour organizations, as well as the affiliates.

In the areas of audio-visual resources, the LESC has been somewhat less successful. We encountered a major problem in trying to find and document all the resources produced by the LESC. This list in Table 5-3 was developed through careful scrutiny of resource lists provided by the national office and of the annual reports of the LESC, and is still incomplete. The list of audio-visual materials is long and the reader should note that most are produced in cooperation with other departments of the Congress and with affiliated labour organizations. The only audio-visual materials which have actually been produced for use in LESC programs include: "Perspectives in Canadian History", a series of historical interviews; "The Art of Cross-Examinaton", a videotape for use in the Arbitration course (two others are listed in the course outline but are not yet available); the Leadership Skill Series, three videotapes produced for the Leadership Skills course; two videotapes for use in Employee Recovery courses; "The Steward", a slide-tape presentation for use in the Steward Training course; transparencies for use in the Basic Instructor Training course; and "The Right to Survive", a slide-tape presentation for use in Health and Safety programs. At the present time, the videotapes used in the Collective Bargaining course were produced by the Media Centre of the University of Toronto for its Industrial Relations Centre. Other audio-visual resources listed have been external productions or specially edited versions of films made by independent producers.

We have some questions about the educational value of some of the materials produced in cooperation with other departments of the Congress. Much of this material is already outdated and of little value to anyone save labour historians. We do note that the audio-visual co-productions in the third and fourth years appear to have more educational merit than those co-produced in the first two years; and that the proposed list of titles to be co-produced with the affiliates bear a direct relationship to educational needs and future courses. We would encourage this trend.

Our major concern with the audio-visual materials is that, at present, there appears to be little coordination between the print materials and the audio-visual materials which are part of the same course. The reviews in Chapter 5 point out some basic concerns with the videotapes which accompany the Collective Bargaining course. Our reviewers, all trade unionists, were of the opinion that the videotapes did not adequately represent the trade union position and portrayed a negative stereotype of women.

Finally, we applaud the original decision of the LESC to make its own programs and resources rather than buying these from external sources. This decision has led to the production of excellent quality print resources. If, in acquiring the necessary skills, the staff occasionally reinvented the wheel, then we would view such efforts as essential learning activities for the program and production staff of the LESC. Staff members have now acquired considerable expertise in the development and production of educational materials, skills which could be used to advantage by the affiliates and could be shared with other labour organizations.

In general, the LESC has learned to use the print medium well. The staff has learned to develop resources through the systematic and sensitive evaluation of need, use of the expertise of labour educators, and the careful testing and revising of materials. When we consider the general lack of print materials in 1977 and the extensive materials available in 1981, we are impressed. The LESC has managed to produce high quality print resources and balance the needs and aspirations of regions and affiliates; and to do so with minimum expenditures. Now its staff must learn to use the audio-visual media equally well. Those audio-visual materials which received positive reviews--"The Right to Survive" and "The Art of Cross-Examination"--are the first steps toward first-rate audio-visual productions. We would encourage the LESC to review what was done in these productions which contributed to the excellent outcomes and to learn from these experiences.

Recommendation: The LESC should review its production of audio-visual materials in the light of current evaluations and of the production experiences, with a view to improving the planning and production processes, to bringing the audio-visual materials up to the same high standard achieved in the print materials, and to developing greater congruence between the print and audio-visual materials used in the same course.

4.8 Finances

Tables 3-22, 3-23 and 3-24 present the expenditures by the Congress of the federal funds. In common with other labour organizations which received contracts, the LESC showed a substantial surplus in the first two years, largely because expenditures were handled judiciously with the intention of avoiding the creation of expectations which could not possibly be met. The surpluses have since been fed back into educational programs in subsequent years, with the result that there was an over-expenditure of educational funds in the third and fourth years.

Expenditures for the national LESC have accounted for about 41% of the total educational expenditures, with the largest single item being for staff salaries. The changes in roles and functions which are currently evolving for the national office indicate that it is likely that expenditures on staff salaries may remain stable while expenditures on the production of educational materials may increase.

Distribution of funds across the regions, as reported in Tables 3-23 and 3-24, tend to be uneven for various reasons. The large proportion of funds transferred to the Quebec Region, actually to the Quebec Federation of Labour, is presumably the result of the fact that the QFL must provide more services and resources to its own members and depend less on the national LESC. The proportion of funds allocated to the Prairie Region can be accounted for by the fact that travel costs in this region are extremely high. The Prairie Region includes three provinces and the Yukon and Northwest Territories. The expenditures in the Pacific Region are unaccountably low. Our attempts to discover the reason for this fact met with little success. It is probable that the British Columbia Federation of Labour and the affiliate locals in that region absorb for most of the wage recovery costs of participants and that students are asked to pay part of the costs of attendance at the Winter School taking one week of their vacation to attend. In any case, the Pacific Region spent far less on wage recovery payments in the fourth year than in the previous three years, and far less than any other region.

Increasingly, Regional Centres have been offering scholarships of fixed amount to affiliates for participants in LESC courses offered in the region. The scholarships cover most of the cost of room and board, tuition, travel, and lost wages. The participating unions make up the difference. In the Pacific Region a program of travel subsidization for participants outside of the lower mainland is in effect.

In contrast, the educational services of the Congress program has been traditionally self-supporting, with the Congress paying the costs of the Regional Director, and the participating unions paying the rest when their members participated in programs. Obviously the provision of scholarships, some on a more generous basis to smaller unions, not only changes the nature of the decison about which members will participate, but as well makes it possible for many unions to participate for the first time.

Our attempts to understand how monies were spend in the four regions were hampered by the fact that each region reports expenditures using its own unique system of expense categories. To ensure more equitable reporting in the future, we would encourage the national and regional offices of the LESC to consult on the development of standardized means for reporting expenditures, events and participants.

The breakdown of expenditures in Table 3-23 compares favourably with a similar breakdown of expenses incurred in the ARLEC program (see p. 124 of the Hepworth Report, Part Two). The major difference lies in the fact that, while ARLEC reports on full payment of instructor salaries and expenses, because it tends to use more external instructors, this item is extremely low in reports from the four regions. The LESC and the Congress are committed to training and utilizing instructors whose salaries and expenses are paid for through the regular educational budget of the Congress or by the affiliates from which the instructors come. Costs for instructors are absorbed as expenses which are not reported as educational, once again creating difficulties in calculating the real costs of educational activities. For example, Appendix R indicates that the Summer School held at Port Elgin in 1981 incurred a real cost of over $25,000 for instructors, a cost which was not charged against the LESC. A similar undertaking at Gimli, Manitoba, indicates that over $4,000 was absorbed as salaries which were unrelated to educational activities. It is impossible to estimate the total uncharged expenditures for educational activities, although we suspect that, at a minimum, the Congress and its various affiliates spend one-third more for educational activities associated with the LESC programs than has been reported in Tables 3-22 through 3-24.

The national office of the LESC reportd to us that the Congress had spent an additional $1,920,000 on education, an average of $480,000 per year. We are aware that the Congress and its affiliates have a long tradition of cooperative financing and of contributions "in kind" for various endeavours; however, we would encourage the Congress, the LESC and the affiliates to take the trouble to estimate educational expenditures for at least the fifth year of the Program as soon as possible.

The relatively steady expenditures on student expenses, which include wage recovery and benefits, indicate that the provision of five-day programs has remained more or less constant over four years. These costs are also an indirect reflection of the fact that there has been very little increase in the availability of paid educational leave for Canadian workers over these four years.

Finally, the costs for one student for one day of instruction are provided in Figure 3-x. These values are calculated using the best information available to us and some estimates of missing information. The relatively low costs for the Pacific Region were attributed to two reasons which, in our opinion, may both contribute to these costs. First, the program and participation report from the Pacific Region included events held in cooperation with local labour councils. However, these events and participants were all removed from the report issued by the national office. Our figures were calculated using the figures in the national report. Our review of reporting practices indicates that all regions include some educational events which are co-sponsored with provincial federations of labour. Therefore, we have assumed that the modified report provided by the national office is correct in regard to events and participants. The second reason is implied in the expenditures which show that the Pacific Region pays less for participant expenses, even though it provides educational programs for more than twice as many individuals as does any other region. Standardized reporting procedures would help unravel this concern.

Recommendation: The Congress, the LESC and the affiliated labour organizations should review all expenditures related to educational activities so that the real costs of education can be assessed. The national and regional offices of the LESC should consult in the development of standardized means for reporting on expenditures, events, and participation in educational activities.

4.9 Evaluation

We are aware that the circumstances associated with the launching of a major new program are not conducive to planning for future evaluations. However, it seemed important to us that the Congress, and in particular the LESC, should initiate methodical collections of information as the program continues to develop.

In all educational endeavours, particularly those within non-educational organizations, many kinds of informal evaluation activities exist. The system is voluntary for both individuals and affiliated organizations. Affiliates can always depend on their own educational programs and stop sending members to LESC programs. Comparisons are constantly being made with other educational activities both inside and outside the labour movement. Above all, the complex administrative structure created for the LESC is a lively arena for discussion and debate of an evaluative nature. However, as the program grows, reliable, consistent and authoritative information is required. An experienced administrator will always heed the assessments of the informal system and, in the long run, will support such activities and give them precedence; but the same administrator must also be aware that the political nature of the labour movement requires that debates and decisions be mediated through the regular gathering of both qualitative and quantitative information about all the activities involved.

In the third and fourth years of the program there has been some change in the matters of evaluation and record-keeping. Two independent evaluation studies have been conducted on two different aspects of the educational activities of the Congress. The educational activities of the Atlantic Region Labour Education Centre were evaluated by A.E. Hepworth and the CLC 1981 Winter School (Pacific Region) at Harrison Hot Springs was evaluated by Dr. Judith Mastai. These evaluation studies were conducted independently and were available to our research team. In addition, annual reports of the activities of the Labour College (Ottawa) for 1979, 1980 and 1981, written by the staff of the College based on written evaluations received from both students and staff, were also available. While these reports are not independent evaluations, they provide some indication of the extent and nature of the Labour College program. All reports from these three sources were used to supplement our own findings in this evaluation.

The National LESC (Ottawa) has undertaken experimentation with various forms for reporting expenditures, the characteristic features of participants, and the nature of instructional outcomes for the entire range of educational programs implemented both nationally and regionally. Appendix M provides an example of one such form. A recent memo from the National LESC (December 11, 1981, from Greg Murtagh, Director, CLC LESC) states that:

> Commencing with our fiscal 1981-82 training programmes, the CLC LESC has instituted two major record-keeping items into our activities. First, each student is required to fill out a

student profile form which gives us demographic information under four headings:

1. individual information, e.g., age, sex, etc.;
2. union information, e.g., union activities, offices;
3. employment data; and
4. educational data.

Secondly, after each training session, a course summary form is returned to national office which includes names of all courses offered, target group, number of classes and students in each class, course length and costs incurred by course.

In comparison with the information available at the time of the Preliminary Evaluation, the CLC has been able to provide us with far more extensive data on all phases of educational activities. The systematization reflected in the foregoing memo, and in control and information systems related to educational media, should provide the basic foundations for effective information gathering and future evaluations. We would, however, advise the Congress to seek assistance in altering existing forms for collecting information from participants so that the form is shorter and simpler, and the information gathered can be coded for computer use. The form which appears in Appendix M was used with only two groups of participants. We found that, while most participants completed the first two pages, many did not complete the last two pages--those which requested personal and education-related information. It was not clear whether non-completers objected to the questions asked or simply gave up after the third page.

We have not seen information related to course summaries and cannot comment on this aspect of the information collecting system. We would encourage the Congress to continue to experiment with information collecting until the difficulties are resolved. The final system should be neither time-consuming nor expensive. We believe that the nature of the educational enterprise under review is such, that if basic data are not collected at the time of the event, the data will be lost and will not be recoverable.

In addition, we believe that the Congress will eventually need to evaluate the various information-gathering systems and evaluative activities to ensure that the results are being used to improve programs and practices, and to assess the cost and benefits of such activities. In many cases, the evaluation procedures themselves are often major determinants of the resulting changes. When an evaluation process poses a question which cannot be answered by existing information, the system for gathering information is itself changed. With the basic systems in place and the preliminary work completed, we believe that, within one year, the CLC should undertake a major review of the information collection and assessment activities in which the LESC is engaged, and that this review should include those individuals and organizations which have been involved in all of the various evaluative activities.

Recommendation: Within the next 12 months, the CLC should commence a review of its system for collecting information and assessing educational programs and policies. This review should include the following objectives:

a) the integration of major evaluative undertakings such as those concerned with ARLEC, Harrison Hot Springs, the Labour College, this evaluative report, and the regular collection of information related to CLC educational activities;

b) an exploration of how and by whom the information collected is used and how it might be used more widely and more efficiently; and

c) the consideration of how the results of various information collection and assessment activities could be of value to Labour Canada and to other labour organizations in Canada.

4.10 Conclusion

The actual expenditures of the LESC related to the federal contract are audited each year by the Federal Government. Our task in this report has been to indicate, to the best of our judgement, how the funds were spent in relation to the educational benefits derived. Given the size and range of the educational activities of the Congress prior to the provision of federal assistance, and given the fact that the contract called for the establishment of a separate administrative structure, we believe that the funds have been managed in ways which achieve the maximum educational benefit. The data provided from our survey of participants in educational activities funded through federal assistance (Chapters One and Two) indicates that those who have been reached have benefitted in terms of their own development and in relation to their work as members of labour organizations. It is clear to us that the Congress, through the educational activities of the LESC, has succeeded in providing competent and effective instruction and learning materials and that this has been accomplished with judicious administration and careful decision-making.

If the criteria set out in Section 4.2 of this chapter are applicable, and we believe that they are, then the evidence presented in Section 4 indicates that the Congress has met and continues to meet these criteria. The concerns to which our recommendations are directed are concerns arising from success, not from failure. That this should be the case is no small matter. The Congress is the recipient of the largest share of LEP funds. There can be no question that its activities can and do provide a model for other organizations, if not in detail, at least in the exercise of judgment and imagination. We believe that a new system of adult education has been developed in Canada in the past five years, providing educational opportunities for Canadians previously denied such opportunities. We believe that new relationships have evolved between the Federal Government and the labour movement and that a new system for financing educational services has emerged. The Congress has performed an essential function in these developments and has served Canadian society well in the process.

TABLE 3-21

Canadian Unions with 50,000 or more Members for 1978 and 1981 Showing Affiliations, Numbers of Locals, and Educational Officers (a)

Rank by size 1978	Rank by size 1981	Name of Union	Membership to nearest hundred 1978	Membership to nearest hundred 1981	Numbers of Locals 1978	Affiliation	Educational Officer(s)
1	1	Canadian Union of Public Employees	252,000	267,400	1,473	CLC	8
(b)	2	National Union of Provincial Government Employees	-----	210,000	---	CLC	8
2	3	United Steelworkers of America	183,600	197,000	864	CLC	5
3	4	Public Service Alliance of Canada	157,300	154,700	17	CLC	2
4	5	International Union of United Automobile, Aerospace & Agricultural Implement Workers	131,300	134,000	111	CLC	1
(c)	6	United Food & Commercial Workers	-----	130,000	---	CLC	1
5	9	Centrale de l'enseignement du Quebec	83,700	81,000	100	Ind.	
6	8	United Brotherhood of Carpenters & Joiners	80,900	89,000	204	CLC	(d)
7	7	Canadian Conference of Teamsters	80,000	92,000	33	Ind.	2
8	11	International Brotherhood of Electrical Workers	70,600	68,600	117	CLC	(d)
9	(b)	Ontario Public Service Employees Union	66,100	-----	379	CLC	(b)
10	10	Federation des affaires sociales	65,500	75,000	384	CNTU	
11	(c)	Meat Cutters & Butcher Workers	64,400	-----	154	CLC	(c)
12	15	International Woodworkers of America	62,300	61,300	63	CLC	1
13	12	Service Employees International Union	58,000	65,000	22	CLC	1
14	14	Canadian Paperworkers Union	57,800	61,500	229	CLC	1
15	13	International Association of Machinists & Aerospace Workers	57,300	63,300	169	CLC	1
16	(c)	Retail Clerks International Association	52,900	-----	21	CLC	(c)
17	16	Labourers' International Union	51,200	51,200	39	CLC	(d)
		Total Membership in Large Unions	1,575,400	1,801,000 (A)			
		Large Unions with CLC Affiliation	1,346,200	1,553,000 (B)			15 (e)
		Total CLC Membership	2,203,800	2,370,000 (C)			
		% of CLC Membership in Large Unions	61.1%	65.5% (B÷C)			
		% of Large Union Membership Affiliated with CLC	85.5%	86.2% (B÷A)			

Notes: (a) Source for 1978: Statistics Canada, Corporation and Labour Unions Returns Act: Report for 1978. Part II: Labour Unions. Ottawa: Ministry of Supply and Services Canada, 1980. Catalogue #71,202S

Source for 1981: Labour Canada, Directory of Labour Organizations in Canada, 1981. Ottawa: Ministry of Supply and Services, Canada, 1981. Catalogue # L2-2/1981

(b) The National Union of Provincial Government Employees consists of 9 provincial associations including the Ontario Public Service Employees Union, the Ontario Liquor Boars Employees, and public employees associations from British Columbia, Alberta, Saskatchewan, Manitoba, Nova Scotia, P.E.I. and Newfoundland.

(c) The United Food & Commerical Workers was formed through the amalgamation of the Meat Cutters & Butcher Workers and the Retail Clerks International Association .

(d) The Service Employees International Union now assumes responsibility for educational activities in these two unions plus 12 other smaller unions.

(e) The Canadian Labour Congress has 15 educational officers employeed in one national and five regional centres.

TABLE 3-22

CLC LABOUR EDUCATION & STUDIES CENTRE - NATIONAL CENTRE
Expenditures by Program Year (July 1st to June 30th)

Expense Item	Year I (1977-78) $ Amount	%	Year II (1978-79) $ Amount	%	Year III (1979-80) $ Amount	%	Year IV (1980-81) $ Amount	%	TOTALS $ Amount	%
Direct Expenses from Courses and Seminars	$ 18,237	(2.2)	$ 78,606	(9.6)	$ 151,979	(12.9)	$ 174,128	(12.0)	$ 422,950	(9.9)
Personnel	162,233	(19,9)	315,405	(38.4)	450,465	(38.3)	573,637	(39.6)	1,501,740	(35.2)
Administration	257,328	(31.6)	158,783	(19.3)	184,045	(15.6)	255,360	(17.7)	855,516	(20.1)
Program Development Equipment	243,412	(29.9)	91,481	(11.1)	148,064	(12.6)	126,499	(8.7)	609,456	(14.3)
Production & Publications	112,532	(13.8)	132,313	(16.1)	140,099	(11.9)	130,283	(9.0)	515,227	(12.1)
Other	21,602	(2.6)	45,677	(5.5)	102,819	(8.7)	187,687	(13.0)	357,785	(8.4)
TOTAL National Centre	$ 815,344	(100%)	$ 822,265	(100%)	$1,177,471	(100%)	$1,447,594	(100%)	$4,262,674	(100%)
Other Expenditures										
ARLEC	-----		224,000		224,384		281,044		729,428	
Labour College	61,198		191,909		128,500		160,000		541,607	
CLC-ILO Symposia	-----		10,000		20,000		20,430		50,430	
Special Projects	-----		11,724		60,056		113,[illegible]6		185,646	
TOTAL Other Expenditures	$ 61,198		$ 437,633		$ 432,940		$ 575,340		$1,507,111	

Notes: Grant to the Altantic Region Labour Education College (ARLEC) was not included in 1977-78 Grant to the CLC.

TABLE 3-23

C.L.C. LABOUR EDUCATION & STUDIES CENTRES - REGIONAL CENTRES
Expenditures by Specific Years

Year I: 1977-78

Specific break-down in expenditures not available.

Year II: 1978-79 ← REGIONAL CENTRE →

Expense Item (a)	Atlantic	Ontario	Prairies	Pacific
	(Figures shown are % of $ totals shown)			
Administration	66.4%	23.9%	26.3%	25.1%
Educational Material	0.2	8.4	3.6	7.9
Instructors & Consultants	15.8	4.3	2.9	3.7
Student Wages & Benefits	3.0	34.0	29.9	44.4
Training & Related Expenses	----	2.5	0.4	0.9
Travel, Meals & Lodging	14.6	23.2	36.9	14.8
Special Projects	----	3.7	----	3.2
TOTAL EXPENDITURES	$ 77,069	$170,983	$170,584	$236,019 (b)

Year III: 1979-80

Expense Item (a)	Atlantic	Ontario	Prairies	Pacific
Administration	33.0%	26.6%	16.8%	24.7%
Educational Material	3.8	0.9	4.5	3.4
Instructors & Consultants	2.4	3.6	1.4	1.1
Student Wages & Benefits	41.2	32.1	38.2	51.2
Training & Related Expenses	0.6	1.0	2.1	0.2
Travel, Meals & Lodging	19.0	18.5	37.0	19.4
Special Projects	----	17.3	----	----
TOTAL EXPENDITURES	$200,016	$280,172	$373,967	$167,988 (b)

Notes: (a) Categories used are those developed for evaluating projects conducted by Independent Labour Organizations by Labour Canada. See Appendix N.

(b) Refer to Table 3-24

Expense items from Annual reports were reorganized and re-categorized to standardize items and compare expenditures across regions.

TABLE 3-23 (continued)

C.L.C. LABOUR EDUCATION & STUDIES CENTRES - REGIONAL CENTRES
Expenditures by Specific Years
(Continued)

Year IV: 1980-81 ← REGIONAL CENTRE →

(Figures shown are % of $ totals shown)

Expense Item (a)	Atlantic	Ontario	Prairies	Pacific
Administration	29.0%	20.5%	17.2%	26.5%
Educational Materials	0.7	2.5	2.4	15.7
Instructors & Consultants	2.7	4.2	6.9	2.2
Student Wages & Benefits	36.1	45.5	40.8	35.7
Training & Related Expenses	----	0.5	0.3	4.1
Travel, Meals & Lodging	31.5	26.8	32.4	15.8
Special Projects	----	----	----	----
TOTAL EXPENDITURES	$274,935	$386,179	$442,457	$273,720 (b)

Estimated cost for one person per day:

This figure was calculated by multiplying the numbers of participants times the numbers of days each attended an educational event. The total number of "person-days" was then divided into the total expenditures for the appropriate region.

	REGIONAL OFFICE			
	Atlantic	Ontario	Prairies	Pacific
Year III: 1979-80				
Total person-days	1566	2215	1773	4556
Average cost for one person-day	$ 127.72	$ 126.49	$ 210.92	$ 36.87
Year IV: 1980-81				
Total person-days	637	699	494	4755
Average cost for one person-day	$ 135.50	$ 147.39	$ 245.67	$ 57.56

TABLE 3-24

CLC LABOUR EDUCATION & STUDIES CENTRES - REGIONAL AND NATIONAL CENTRES
Expenditures by Program Year (July 1st to June 30th)

Office	Year I (1977-78) $ Amount	%	Year II (1978-79) $ Amount	%	Year III (1979-80) $ Amount	%	Year IV (1980-81) $ Amount	%	TOTALS $ Amount	%
ATLANTIC Region (a)	$ 2,888	(0.2)	$ 77,070	(3.4)	$ 200,016	(6.7)	$ 274,935	(7.2)	$ 554,909	(5.3)
QUEBEC (Direct Grant to Q.F.L.)	300,000	(21.9)	334,469	(14.9)	361,457	(12.1)	394,711	(10.4)	1,390,637	(13.4)
ONTARIO Region (a)	41,698	(3.0)	170,983	(7.6)	280,172	(9.4)	386,179	(10.2)	879,032	(8.4)
PRAIRIE Region (a)	29,479	(2.2)	170,584	(7.6)	373,967	(12.5)	442,457	(11.7)	1,016,487	(9.8)
PACIFIC Region (a)	118,132	(8.6)	236,019	(10.5)	167,988	(5.6)	273,720	(7.2)	795,859	(7.6)
TOTAL Regional Centres	$ 492,197	(35.9)	$ 989,125	(44.0)	$1,383,600	(46.3)	$1,772,002	(46.7)	$4,636,924	(44.5)
TOTAL National Centre (b)	815,344	(59.6)	822,265	(36.6)	1,177,471	(39.3)	1,447,594	(38.1)	4,262,674	(41.0)
TOTAL Other Expenditures (c)	61,198	(4.5)	437,633	(19.4)	432,940	(14.4)	575,340	(15.2)	1,507,111	(14.5)
TOTAL EXPENDITURES	$1,368,739	(100%)	$2,249,023	(100%)	$2,994,011	(100%)	$3,794,936	(100%)	$10,406,709	(100%)
INCOME Federal Grants	$2,000,000		$2,400,000		$2,620,800		$2,864,532		$ 9,885,332	
Other income	36,139		89,913		115,822		149,362		391,236	
TOTALS	$2,036,139		$2,489,913		$2,736,622		$3,013,894		$10,276,568	
Surplus/(Deficit)	$ 667,400		$ 240,890		$ (257,389)		$ (781,042)		$ (130,141)	

Notes:
(a) For breakdown of Regional Expenditures, refer to Table 3-23
(b) For breakdown of National Expenditures, refer to Table 3-22
(c) For breakdown of Other Expenditures, refer to Table 3-22

TABLE 3-25

Characteristics of Participants

Characteristic	B.C. Winter School(a)	Port Elgin School(d)	Thunder Bay School(d)	ARLEC (b)	Labour College(c)
SEX: Male	75%	75%	78%	81%	not available
Female	25	25	23	19	
AGE: 20-25 years	8%	10%	6%	10%	8%
26-35 years	42	41	55	55	61
36-45 years	31	33	30	33	25
46-55 years	15	11	8	2	6
56-65 years	4	2	1	-	-
LENGTH OF TIME AS MEMBER OF UNION:					
1- 5 years	19%	21%	37%	38%	not available
6-10 years	33	26	30	38	
11-20 years	34	32	26	24	
Over 20 years	14	7	7	--	
PREVIOUS EDUCATION:					
Elementary School	not available	100%	100%	100%	100%
Secondary School		96	96	93	95
Post-secondary		34	38	2	64
Labour Education		90	77	35	55
POSITION IN UNION:					
Member	---	19%	7%	13%	not available
Officer	35%	--	--	87	
President	--	50	40%	--	
Steward	21	20	39	--	
Other	--	17	15	--	
Staff/Business Rep.	9	3	--	--	
Delegate to Central Labour Organization	3	54	37	--	

NOTES: (a) Data obtained from Mastai Report previously cited. Age groupings differed slightly and distinction between elected officers only extended to identification of Stewards.

(b) Data obtained from Hepworth Report previously cited.

(c) Data obtained from 1981 Report of the Labour College of Canada previously cited. Educational information was unclear from figures provided in this report, a difficulty arising from the fact that the number of years to complete secondary school varies from province to province.

(d) Data compiled from STUDENT PROFILE sheets (Appendix M). Random sample selected from each group.

Available information recategorized to standardize data for comparison purposes.

TABLE 3-25 (continued)

Characteristics of Participants in Selected Events 1981

Most Active Unions in Educational Events

Union	B. C. Winter School(a)	Port Elgin School(b)	Thunder Bay School(c)	Labour College(d)	Education Officer(e)
CUPE	19	3	4	11	yes
OPSEU (NUPGE)		7	3	4	yes
USWA	9	9	6	4	yes
UAW	1	12	8	3	yes
BRAC	9	3	13	2	yes
CBRT & GW	1	4	2	2	yes
CPU	5	2	6	2	yes
ECWU	1	2	2	2	no
PSAC	6	8	4	7	yes
UFCW	5	1		2	yes
IAM	3	3	2		yes
IWA	34			3	yes
CALEA	1	2	1	1	yes
OPEIU		1	5	1	no
UTU	2	1	2	1	no
CUPW	3		1	1	yes
SEIU	1	1	4		yes
BCGEU (NUPGE)	73			2	yes
UGCWA	1	1		1	no
ACTWU		2		1	yes
OBLEU (NUPGE)		2	3		no
IBEW	9			2	no
CJA	10			1	no

Notes: Not all unions participating in these events are listed.

(a) Direct count of 3rd week of 1981 B. C. Winter School

(b) Direct count of participants at Port Elgin from Student Profiles

(c) Partial count (50%) of participants at Thunder Bay from Student Profile Sheets.

(d) Data obtained from 1981 Report of the Labour College of Canada

(e) See Appendix Q.

TABLE 3-26

CANADIAN LABOUR CONGRESS - LABOUR EDUCATION & STUDIES CENTRES

Programs by Topic, Region, and Numbers of Participants/Events
Years I and II: 1977 - 79

Topic of Event	Location of LESC National	Atlantic	Ontario	Prairies	Pacific	TOTALS
	(numbers of participants/ numbers of events)					
Collective Bargaining	34/ 2	-----	-----	80/ 4	115/ 5	229/11
Communication	12/ 1	-----	-----	-----	42/ 2	54/ 3
Conditions of Work	-----	-----	10/ 1	-----	85/ 4	95/ 5
Health & Safety	2122/19	66/ 1	-----	-----	109/ 4	2297/24
History of the Labour Movement	-----	-----	-----	-----	-----	-----
International Scene	-----	-----	14/ 1	-----	-----	14/ 1
Labour Legislation	55/ 1	-----	99/ 2	190/ 3	87/ 3	431/ 9
Labour's Role in the Community	-----	-----	20/ 1	-----	54/ 3	74/ 4
Social, Political & Economic Affairs	77/ 2	-----	-----	-----	186/ 7	263/ 9
Training & Education	144/ 8	-----	213/10	50/ 3	155/ 8	562/29
Welfare Programs	-----	64/ 4	-----	-----	244/ 2	308/ 6
Other: Research Scholarships	-----	-----	56/ 1	-----	-----	56/ 1
TOTALS	2444/33	130/ 5	412/16	320/10	1077/38	4383/102

TABLE 5-26 (continued)

CANADIAN LABOUR CONGRESS - LABOUR EDUCATION & STUDIES CENTRES

Programs by Topic, Region, and Numbers of Participants/Events
Years III and IV: 1979 - 81

Topic of Event	Location of LESC National	 Atlantic	(numbers of participants/ numbers of events) Ontario	 Prairies	 Pacific	TOTALS
Collective Bargaining	78/ 4	112/ 5	151/ 7	-----	279/ 8	620/24
Communication	-----	45/ 2	66/ 4	41/ 4	97/ 5	249/15
Conditions of Work	-----	67/ 4	350/ 5	57/ 2	653/15	1127/26
Health & Safety	1367/20	609/11	17/ 1	129/ 3	292/10	2414/45
History of the Labour Movement	-----	-----	38/ 2	14/ 1	110/ 1	162/ 4
International Scene	-----	-----	35/ 2	64/ 2	-----	99/ 4
Labour Legislation	-----	24/ 1	57/ 3	91/ 4	170/ 6	342/14
Labour's Role in the Community	-----	-----	54/ 3	185/ 6	68/ 4	307/13
Social, Political & Economic Affairs	36/ 1	95/ 5	-----	184/10	257/ 7	572/23
Training & Education	387/18	154/ 5	336/18	182/ 6	494/18	1553/65
Welfare Programs	-----	41/ 2	-----	24/ 1	126/ 3	191/ 6
Other: Research Scholarships	-----	-----	83/ 2	-----	-----	83/ 2
TOTALS	1868/43	1147/35	1187/47	971/39	2546/77	7719/241

FIGURE 3-u

Organization for Education within the CLC

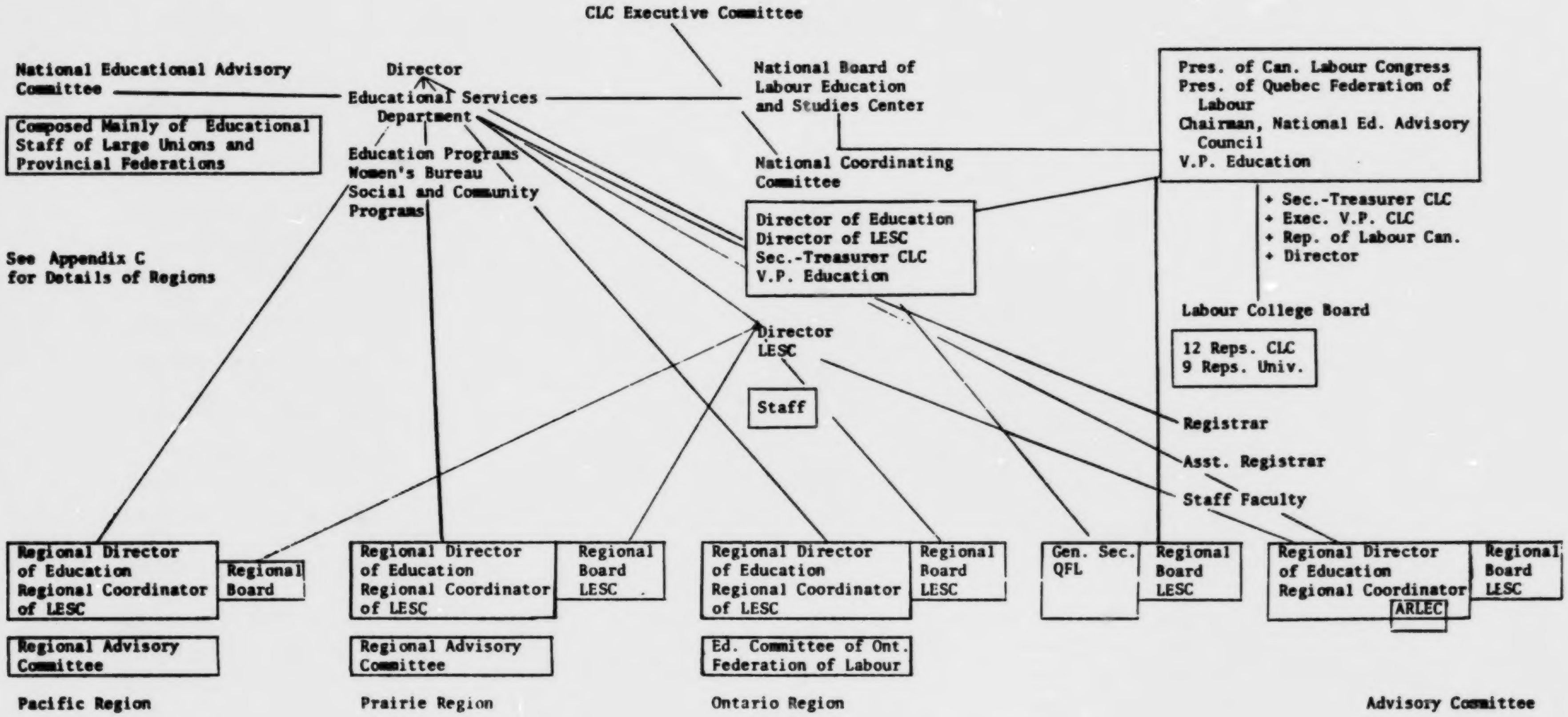
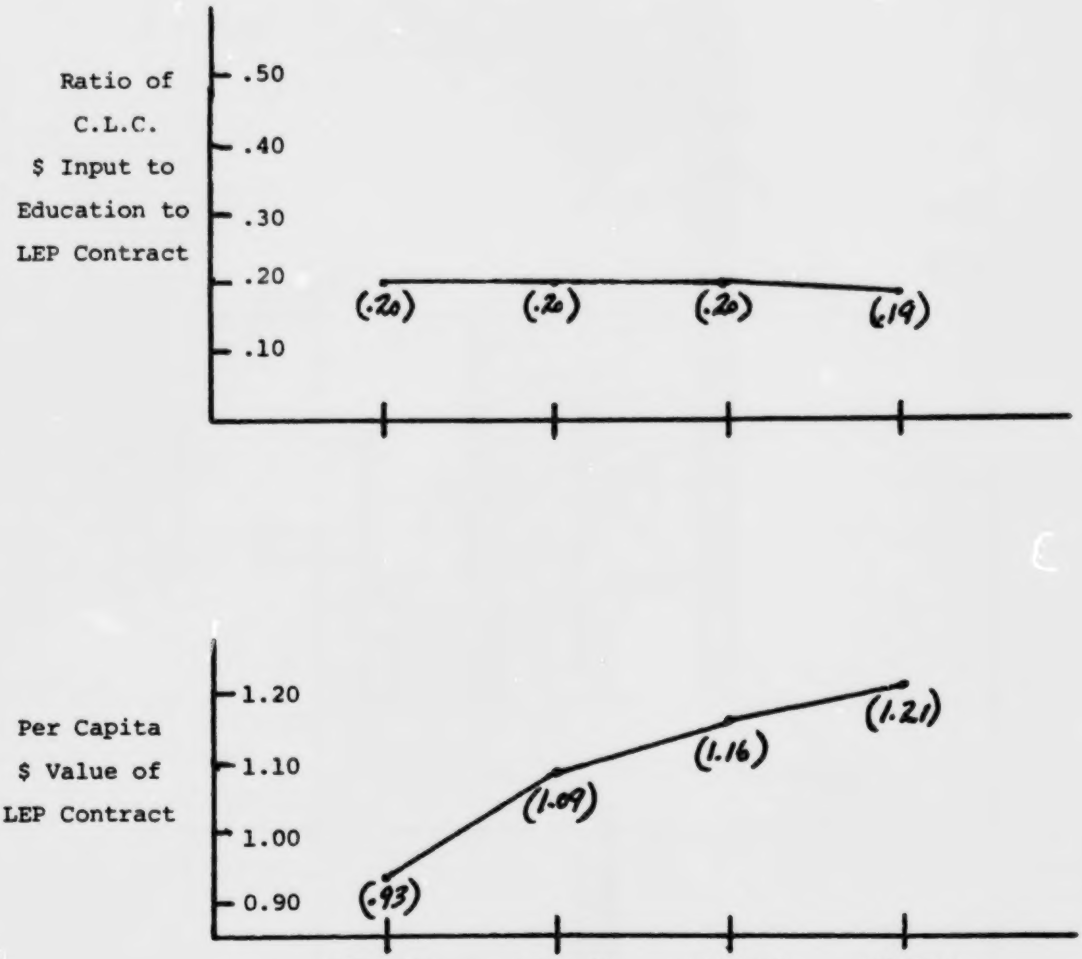

CLC Executive Committee
National Educational Advisory Committee
Composed Mainly of Educational Staff of Large Unions and Provincial Federations
Director
Educational Services Department
Education Programs
Women's Bureau
Social and Community Programs
National Board of Labour Education and Studies Center
National Coordinating Committee
Pres. of Can. Labour Congress
Pres. of Quebec Federation of Labour
Chairman, National Ed. Advisory Council
V.P. Education
+ Sec.-Treasurer CLC
+ Exec. V.P. CLC
+ Rep. of Labour Can.
+ Director
Labour College Board
12 Reps. CLC
9 Reps. Univ.
Director of Education
Director of LESC
Sec.-Treasurer CLC
V.P. Education
See Appendix C for Details of Regions
Director LESC
Staff
Registrar
Asst. Registrar
Staff Faculty
Regional Director of Education Regional Coordinator of LESC
Regional Board
Regional Advisory Committee
Pacific Region
Regional Director of Education Regional Coordinator of LESC
Regional Board LESC
Regional Advisory Committee
Prairie Region
Regional Director of Education Regional Coordinator of LESC
Regional Board LESC
Ed. Committee of Ont. Federation of Labour
Ontario Region
Gen. Sec. QFL
Regional Board LESC
Regional Director of Education Regional Coordinator
ARLEC
Regional Board LESC
Advisory Committee

FIGURE 3-v

CANADIAN LABOUR CONGRESS - LABOUR EDUCATION & STUDIES CENTRES

Comparison of Various Statistics
over Four Years



	1977-78	1978-79	1979-80	1980-81
Total Value of Contract	$2,000,000	$2,400,000	$2,620,800	$2,864,532
Estimated Membership	2,160,000	2,200,000	2,260,000	2,370,000
Additional $ Spent on Education by C.L.C.	$ 400,048	$ 468,063	$ 517,879	$ 533,434

FIGURE 3-w

CANADIAN LABOUR CONGRESS - LABOUR EDUCATION & STUDIES CENTRES

Participation Rates

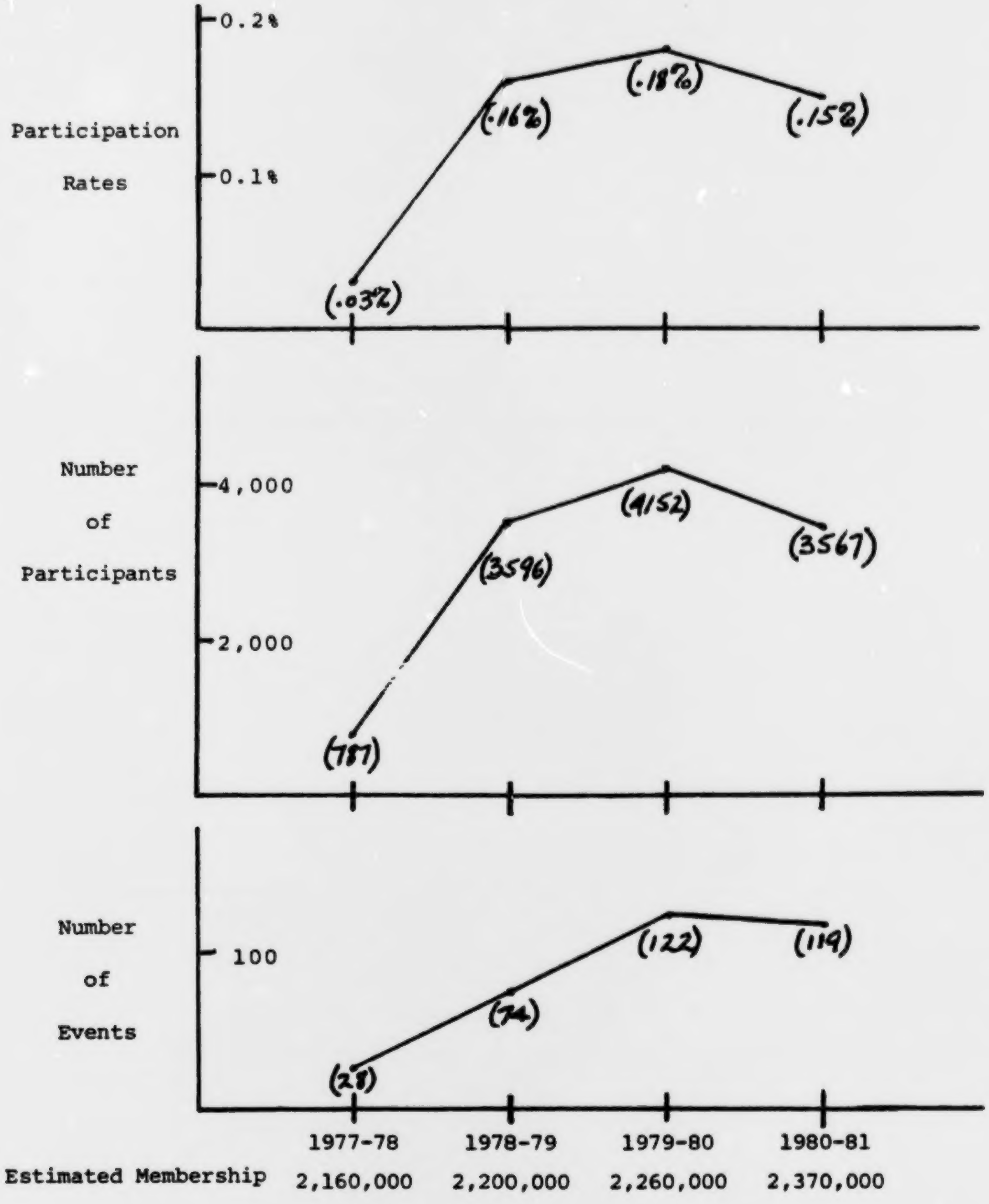


FIGURE 3-x

CANADIAN LABOUR CONGRESS - LABOUR EDUCATION & STUDIES CENTRES

Number of Person-days and Average Cost for One Person-day by Regions for Years III and IV.

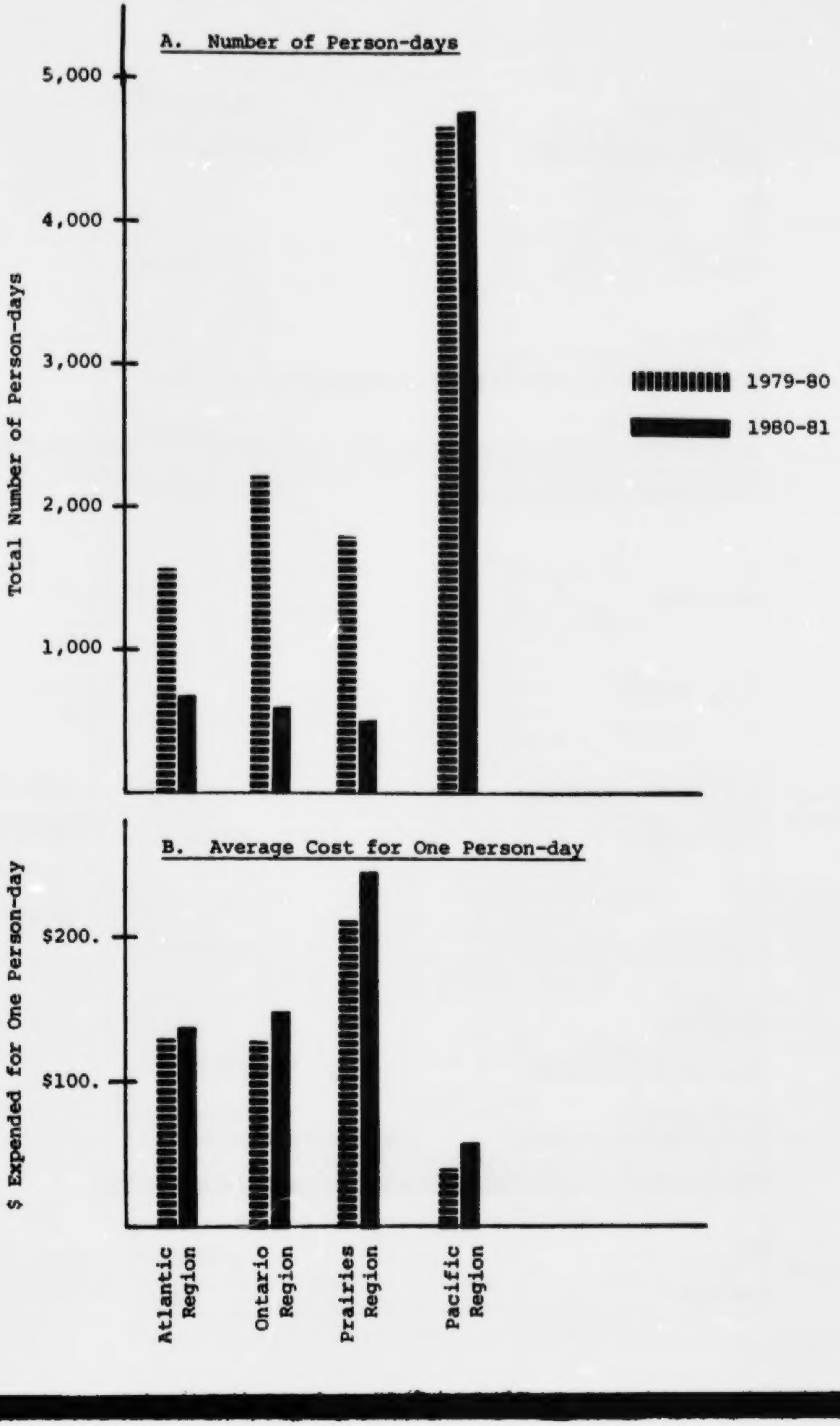


FIGURE 3-y

CANADIAN LABOUR CONGRESS - LABOUR EDUCATION & STUDIES CENTRES

Programs by Topic, Years, and Numbers of Participants

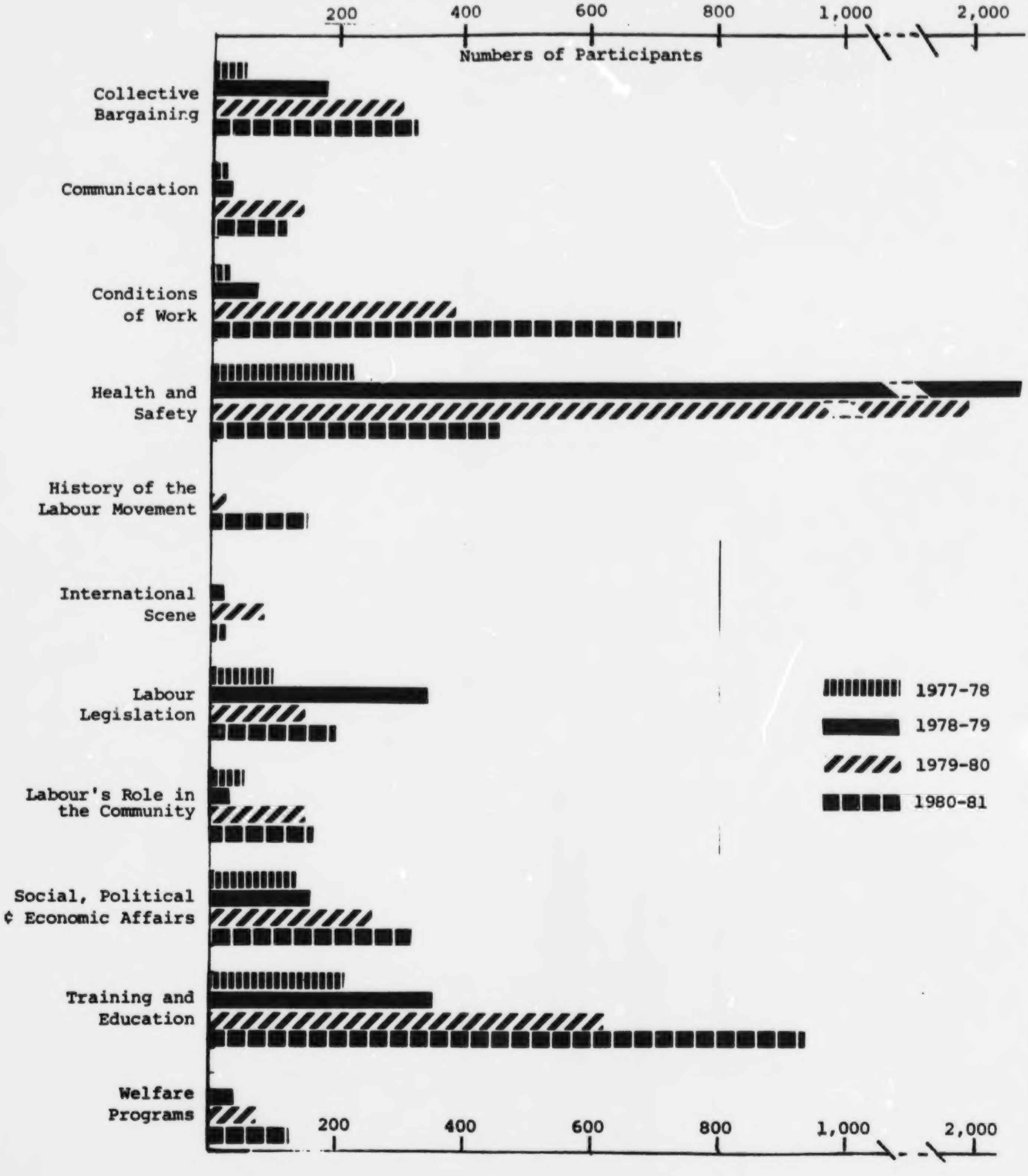


FIGURE 3-z

CANADIAN LABOUR CONGRESS - LABOUR EDUCATION & STUDIES CENTRES

Programs by Topic, Years, and Numbers of Events

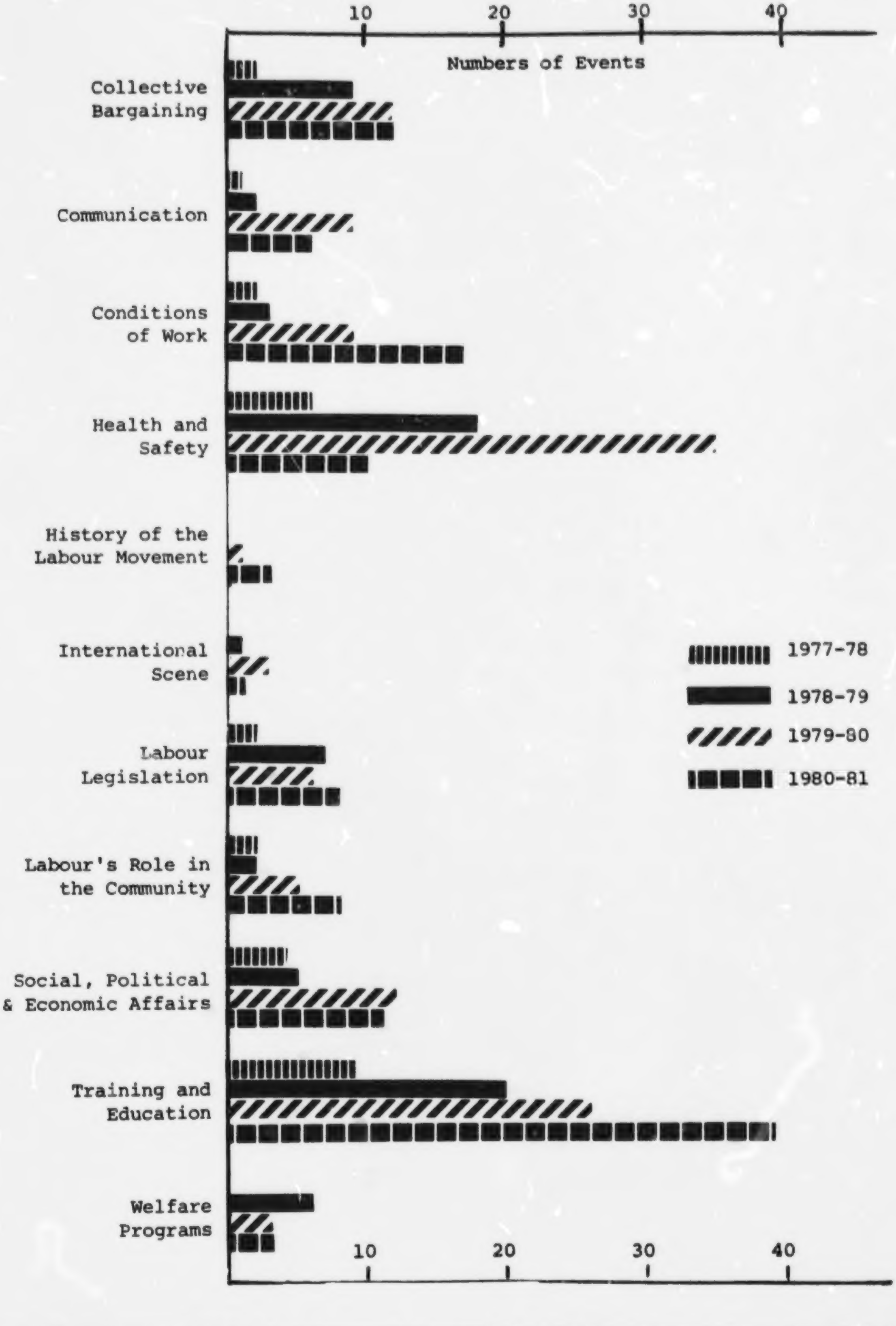
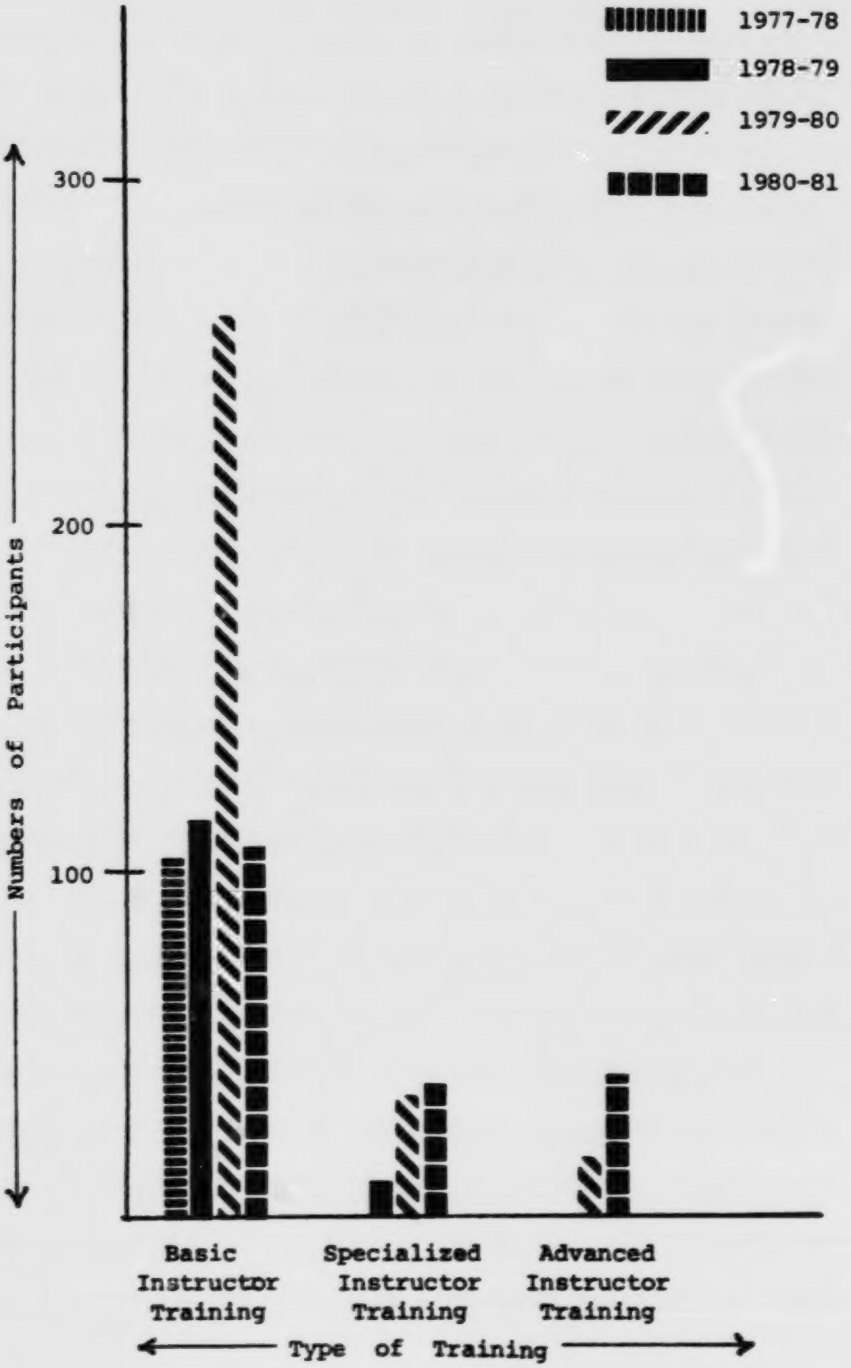


FIGURE 3-aa

CANADIAN LABOUR CONGRESS - LABOUR EDUCATION & STUDIES CENTRES
Instructor Training by Year and Context



CHAPTER FOUR

The Post-Secondary Institutions and the Bursarists

Section 1: Post-Secondary Institutions

1.1 Background

Contributions to post-secondary institutions represented 1.8% of the total LEP expenditures for the four years under examination. In 1977-78, applications were received from twelve institutions requesting funds amounting to $422,875 and contributions totalling $205,767 were made. One institution applied for but did not receive a contribution. In 1978-79, eighteen institutions made application for contributions totalling $647,075. Despite an announcement by the Minister of Labour on May 15, 1978, that $200,000 would be available for this component of the LEP, the entire sub-program was eliminated by the Federal Government as part of general reductions in federal expenditures. No further contributions to post-secondary institutions were made following the first year of the Program. The National Advisory Council on Labour Education, which was established in the first year of the LEP and made recommendations to the Minister of Labour regarding the allocation of funds available to post-secondary institutions, was eliminated at the start of the second year.

The various means which can be used to provide public support for the accomplishment of educational objectives have already been described in Chapter 3, as have the means chosen by the Federal Government in it program of assistance to labour education. However, there are no clear statements of objectives for the post-secondary component. It was described as being complementary to the provision of grants to independent labour organizations and bursaries to individuals. It appears that the activities of post-secondary institutions were viewed as providing one means for enhancing the educational activities of both independent labour organizations and bursarists; and that the Federal Government intended to encourage both those institutions which had already developed programs of labour education and those which had demonstrated a willingness and ability to develop cooperative relationships with segments of the labour movement wishing to initiate such programs. The post-secondary component seems, therefore, most directly associated with the stated LEP objective of equalizing access to educational resources for special groups in Canadian society. This objective was a reflection of the general belief that the Canadian educational system had been indifferent and unresponsive to the aspirations of many groups with special educational needs, of which the labour movement was one.

Relationships between the labour movement and the majority of post-secondary institutions in Canada had been characterized by indifference, suspicion, and occasional hostility. In 1977, an officer of the Canadian Labour Congress wrote a letter to all post-secondary institutions in Canada stating the terms under which cooperation might be achieved for the development of labour education. The heads of a number of institutions indicated that the majority of these conditions, particularly those relating to the selection of instructors and the development of course materials, were entirely unacceptable, if not plainly illegal, as far as their institutions were concerned. The two groups had been divided, not only by inattention and the apparent refusal of most post-secondary institutions to allocate resources to special programs for and about the labour movement, but also on perceived ideological differences related to the teaching of the social sciences which affect the core of any instructional program. In addition, there had been a general reluctance on the part of post-secondary institutions to make existing resources available with respect to flexible times, locations and schedules suited to the needs of workers and the patterns of work life.

The Federal Government, therefore, sought to strengthen existing labour education activities in post-secondary institutions as one means of fostering deliberate and systematic responses to the labour movement by the educational system. Further, it sought to strengthen these activities in institutions which appeared to be best suited to carry out systematic study, research and teaching, and to ensure the availability of these activities to members of the labour movement as well as to other citizens. The desire to ensure availability resulted in the requirement that any application from a post-secondary institution was to be accompanied by a written endorsement from one of more supporting labour organizations (as these were defined by the LEP). Further, each proposal had to indicate that an advisory committee, composed of representatives of local labour organizations, would be maintained to coordinate and advise on the conduct of labour studies. Proposals which were rejected in 1977-78 did not meet the criteria for sponsorship.

The indicators we have used in this report to evaluate the post-secondary component of the LEP include the following:

a) appropriateness of approved projects for the institution receiving funds;

b) completion of projects as proposed;

c) evidence of strengthening of existing labour education programs; and

d) development of positive relationships between recipient institutions and supporting segments of the labour movement.

1.2 The Recipients

Table 4-1 indicates the number of existing post-secondary institutions in each province at the start of the LEP, the number reporting existing programs in labour studies in 1977, and the number requesting and receiving contributions. A survey of 178 post-secondary institutions (conducted in 1977 by the CAAE[13] at the request of Labour Canada) indicated that out of a response from 127 institutions, 31 reported that they were conducting some form of labour-related studies. Fifty-one institutions (29%) did not reply to the survey questionnaire and were reported as being among those having no labour-related studies.

It should be noted that the term "labour studies" was frequently interpreted as meaning educational activities in the area of industrial or labour-management relations. The province with the largest number of institutions reporting some form of labour-related studies was Ontario. No labour-related studies were reported as existing in Saskatchewan and Prince Edward Island.

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[13] Canadian Association for Adult Education, "Survey of Post-Secondary Institutions in Canada". Report of a survey undertaken for Labour Canada, Toronto, 1978.

A survey of the calendars of English-speaking post-secondary institutions in 1981 (approximately 120) indicated that 45 appear to provide courses in labour-related studies, but only 12 of these offer programs which are distinctively and directly related to labour or workers' education. It sould be noted that one post-secondary institution, known by the researchers to have an active labour studies program, provided no mention of this program in the calendar, although its Director was listed among the faculty. While this was an extreme case, the researchers' impressions were that finding information about labour-related programs is not facilitated by the normal publicity methods of most post-secondary institutions. Prospective students would have some difficulty obtaining information about such programs if publicity is provided on a limited basis and is not available to the general public.

Of the 31 institutions reported in Table 4-1 as having labour-related studies in 1977, only eight applied for contributons in the first year of the LEP. The other four recipients had had no previous labour-related studies. McMaster University, an institution with an extensive labour studies program, was refused funding in the first year.

In the second year of the Program, eighteen institutions filed applications for contributions and thirteen of these had been among the 31 reporting labour studies programs in 1977. A comparison between the two years shows that in the first year 62% of the applicants had previously existing labour studies programs and in the second year 75% of the applicants had such programs. This portion of the LEP, therefore, appears to have reinforced programs of labour studies already in existence, and to have contributed to the development of some new programs.

1.3 Projects

Contributions to post-secondary institutions were not calculated on the basis of any financial formula; rather the amount of any one contribution was determined according to the total amount of funds available and the need of the applicant. Amounts granted were subject to the judgment of the members of the National Advisory Council who were responsible for making recommendations to the Minister of Labour. Decisions were based on the coherence of the proposal, the relevance of each proposal to the estimated financial need of the project, the location of the institution, and the extent of support offered by local labour orgaizations. Efforts were made to support at least one project in each region. Decisions were also influenced by the belief that contributions for post-secondary institutions would remain part of the LEP for the full five years. For example, the contribution made to the Maritime School of Social Work was based on this belief.

Only one institution, the University of Saskatchewan, received exactly the funds requested. All other institutions received less than requested. Reductions varied from 86%, in the case of the Maritime School of Social Work, to 6% in the case of Northwest Community College. The average amount of reduction was $1,800. Some institutions reported that the reduction in funds awarded necessitated radical changes in their initial plans and contributed to their inability to complete projects, even by the end of the second year of the LEP.

Table 4-2 indicates the amounts requested by, and awarded to, various post-secondary institutions, and some characteristics of the projects carried out in the first year of the Program. All projects began during the first program year, but not all were completed. Interviews with representatives of several post-secondary institutions indicated that plans had to be changed on the basis of funds actually received; of the unexpected termination of long-term plans; of inevitable delays associated with committee consultations; of problems locating instructors; and of changes in circumstances related to staff associated with the original application. For example, in the case of the Ontario Institute for Studies in Education, the last minute cancellation of the trip of a visiting instructor from the labour movement, and the absence of the project director in the subsequent year, set back completion of the project for more than one year. Other institutions, particularly those engaged in teaching projects, experienced similar difficulties.

The research project proposed by Athabasca University was completed successfully and the report is now in circulation in Alberta and is available to other provinces. The funded portion of the project of the Maritime Scool of Social Work was undertaken, but the project, as originally proposed, had to be abandoned when the post-secondary component of the LEP was cancelled. The start-up funding provided for this project resulted in a bonus to the LEP in that the School of Social Work developed a proposal which can be used as a model for future research. The plan alone was probably worth the funds granted.

Those institutions which were engaged primarily in teaching reported increased in the number of teaching contracts centering on labour studies with both labour organizations and the general public. Each institution reported on participation figures usng different methods, maing it impossible to calculate total participation in terms of standardized units. Further, those institutions which engaged full-time staff to supervise labour studies programs, reported that staff members participated in extensive consulting work which could not be reflected in regular participation figures or classroom contact hours.

Curriculum materials, for use by both institutions and labour orgaizations, were developed and tested by at least five institutions: Simon Fraser University, Capilano College, Humber College, Niagara College, and the University of New Brunswick. The need for such material proved to be so great that some materials were put into use before testing could be completed.

A list of materials and reports produced by post-secondary institutions with funds from the LEP is providesd in Appendix U.

1.4 Outcomes

In the first year of the LEP, labour studies programs for credit were strengthened in at least three colleges which received contributions. In addition, both credit and non-credit courses offered increased opportunities for members of the general public to participate in labour studies. Niagara College had doubled the enrolment in its Certificate Program by 1979-80 and several of the videotapes produced with LEP funding for teaching purposes, have been offered on local cable television. Both Capilano College and Humber College have recently reported increases in their program activities in both credit and non-credit areas. The remaining colleges which received contributions in the first year of th LEP have reported that, since 1978, although programs have not been discontinued, few have grown and several have decreased in enrolment and course offerings.

Among the universities which received contributions, Simon Fraser, Laval and New Brunswick still offer labour studies programs on a non-credit basis. Discussions are currently underway at Simon Fraser concerning the development of a certificate program in labour leadership. A follow-up survey conducted by mail in 1981 of those institutions which had applied for LEP funds in the first two years of the Program (see Appendix T), indicated that credit courses leading to a certificate are now being offered at the University of Manitoba and Dalhousie University, and that courses for credit are still being offered at the Ontario Institute for Studies in Education. McMaster University now offers a full-time credit program in labour studies.

One possible effect of the general lack of credit programs in labour studies is to place additional pressure on the bursary component of the LEP. Without labour studies courses for credit, potential bursarists may not be able to find labour-related courses in recognized post-secondary institutions in Canada.

In the 1981 survey of post-secondary institutions, three colleges reported an increase in financial support from their own internal administrative structure and two reported having received financial assistance from provincial governments. Provincial assistance was usually directed toward programs related to occupational health and safety.

Nine of the post-secondary institutions receiving contributions in the first year reported substantial increases in contractual activities as a direct result of the LEP. These institutions appear to have become more willing and able to respond to specific requests from labour organizations, such as indpendent labour organizations wich received grants from the LEP and then contracted with post-secondary institutions for the development and implementation of specifically-designed educational activities.

Three of the post-secondary institutions funded in the first year of the Program carried out research projects and several were involved in the development of educational resources. Research activities are currently being carried out at Simon Fraser University and at the Ontario Institute for Studies in Education. Educational resources are being produced by Niagara College, Capilano College, and the University of Toronto, among other institutions.

The sudden termination of the post-secondary component of the LEP produced a variety of results. The programs at three institutions--the Maritime School of Social Work, the University of New Brunswick, and Confederation College--were seriously interrupted. Activities at both the University of New Brunswick and Confederation College were sharply reduced, with little hope of regenerating momentum without further external funding. Both institutions serve a number of small communities and small independent labour organizations. The project at the Maritime School of Social Work, which had been envisaged as a long-term activity, had to be severely curtailed.

In contrast, the initial contributions from the LEP appeared to act as an important stimulus for expansion at other institutions. In particular, Humber College, Simon Fraser University and Capilano College have all experienced growth in programs, have received additional funding from internal and external sources, and have reported increased participation. While these institutions were concerned about the overall impact of the termination of funding to post-secondary institutions, none was particularly dismayed by the effects of cancellation of their own programs.

1.5 Relationships with the Labour Movement

There is still some dispute and ambivalence over the definition and development of roles appropriate to the post-secondary institutions in relation to the labour movement. The research projects undertaken were appropriate to the institutions receiving grants for them. It is not clear that such projects would or could be carried out by any other agencies. Projects associated with teaching where university or college credit is involved could not be undertaken by other agencies. In fact, it seems certain that for other agencies to take on the onerous tasks of certifying labour studies would be counter-productive when the organizational structures and expertise for theses tasks are already in place in publicly-funded post-secondary institutions.

However, in the non-credit and contractual areas, role definitions are harder to establish. Some of the work carried out by post-secondary institutions might have been done more appropriately by labour organizations themselves. In some parts of the labour movement, the conviction still exists that even higher levels of study and teaching, those normally associated with post-secondary degree or certificate work, cannot be entrusted to post-secondary institutions as they are presently governed and administered in Canada.

Evidence does exist, however, that rational distinctions are being made. Several post-secondary educators indicated to us that their resources are most productively used when directed toward such activities as needs assessment, course design, resource material preparation and evaluation.

Strengthened relationships between post-secondary institutions and their advisory labour committees were reported in every case except one. Two institutions reported that the termination of this component of the LEP resulted in a sharp decline in the activities of advisory committees.

Despite the limited development of such relationships in the past, there has been considerable evidence of cooperative work taking place on specific projects. Project by project, especially in non-credit areas, there has been increasing cooperation in the selection of instructors, the preparation of materials, and the design of programs--areas which, in the past, have proven to be difficult and open to dispute. It was pointed out to us that cooperative efforts tend to be cyclical as members of committees are replaced and as general social and economic conditions vary from time to time and region to region. While overall progress is heartening, it can only be regarded as a somewhat undependable beginning.

1.6 Conclusions

It seems clear that the projects were appropriate to the institutions receiving grants. Although there was some confusion in the teaching programs, it is apparent that even one year of federal funding gave impetus to the growth of expertise and cooperative relationships for both post-secondary institutions and the supporting labour organizations.

The attempt to provide an even distribution of regional contributions was somewhat less successful. Ontario and British Columbia are the two provinces with the greatest concentration of English-speaking labour organizations. Both provinces appear to have acquired stronger foundations for labour studies in post-secondary institutions. The same development has not occurred in other regions. It seems likely that funds derived from the remaining components of the LEP, to the extent that such funds are directed toward post-secondary institutions at all, will be directed toward existing labour studies programs. If post-secondary programs are to develop in the Prairie and Atlantic regions, other sources of funding or other motivating factors must emerge. If the Federal Government believes that the post-secondary educational system can play an important role in the development of a wide variety of labour education activities, then future funding arrangements must benefit both the labour movement and the post-secondary institutions.

We have some evidence that labour studies have been strengthened at the University of Saskatchewan and that useful relationships have been established in that province. The study by Athabasca University has provided valuable information for the province of Alberta. It is impossible to assess the results of the aborted study proposed by the Maritime School of Social Work. However, we are aware that Dalhousie University has since developed credit programs in labour studies.

The lack of support provided for McMaster University, with its advanced program of credit and non-credit studies, must remain a disappointment. It seems likely that the McMaster application, like that of the Maritime School of Social Work, was a victim of the misplaced expectations regarding the duration of the post-secondary component of the LEP.

All programs which were funded were initiated as proposed; and there is sufficient evidence of student participation, courses, conferences, consultations, and resource development to persuade us that the LEP objectives for this component were being achieved.

Not all projects were completed by the end of the first two years of the LEP and one remained incomplete at the end of the fourth year. Major difficulties were encountered in the teaching programs. The characteristics of such programs persuade us that educational programs and supporting materials cannot be planned, designed, produced, tested, revised, completed and evaluated within a twelve month period. Support for teaching programs should extend over longer periods of time. The National Advisory Council, at its first meeting, recognized this problem and advised the Minister of Labour that the basis on which contributions to post-secondary institutions for teaching purposes should be changed to provide support over extended periods to allow for the adequate development of programs and materials. Labour Canada appears to have recognized this principle in making extended grants to individual bursarists and extended contracts with federated labour organizations. It seems possible that Labour Canada also indirectly recognized the problem with respect to post-secondary institutions in that it paid the second installment of the contribution on the basis of reasonably detailed plans for the future completion of programs rather than on the basis of evidence of completed programs. We are inclined to support this decision although it was not part of the original guidelines.

However, we are concerned about the absence of proper follow-up in areas other than financial and the absence of a systematic means for reporting activities which would permit comparisons, for example in participation or program content. If the post-secondary component of the LEP is to be reintroduced in the future, these concerns must be addressed by Labour Canada.

In terms of the objective of the LEP, there can be no doubt that the post-secondary component contributed to the development of members of labour organizations as individuals, through credit and non-credit programs, and to their development in their roles within the labour movement, particularly through contractual work done in cooperation with specific labour organizations.

Despite historical differences between the labour movement and the post-secondary institutions, a great deal of cooperation has taken place and much has been learned by both parties. One post-secondary educator reported to us that he was determined to persuade the labour movement that it must not abandon the educational system as a viable means for achieving educational objectives and in terms of receiving a fair share of the resources available through the post-secondary institutions.

Finally, there still exists concerns about the degree to which the objectives of the LEP can be met through the development of systematic programs of labour studies which exist through the interdependent activities of the educational system and the labour movement. We believe that such development is possible and can result in increasing security in the establishment and growth of labour education. The dialogue which would, of necessity, accompany such interdependent activities would require both parties to be more explicit in defining needs, objectives, and roles, to be more responsible in the effecive and efficient use of public resources, and to be more responsive to each other.

1.7 The Future

There is still much argument about the best mixture of financial support for accomplishing the objectives of the LEP. Without exception, those we interviewed believed that labour organizations must have their own financial resources for education and that entitlement to public assistance represented by the LEP is legitimate and should continue. However, there is a greater mixture of opinion about the provison of financial support for post-secondary institutions for the development of labour studies and about the means by which such support should be provided. Although there were few protests received by Labour Canada from labour organizations when the post-secondary component of the LEP was eliminated, our interviews suggest that some protests were not directed to Labour Canada. While there was a diversity of opinion about the reinstatement of the post-secondary contributions, there was unanimous opinion that all such contributions should be the result of joint applications by the institutions and cooperating labour organizations.

In addition, we encountered powerful convictions that Canada needs an institution devoted to advanced labour studies which would be both associated with certification and available for non-credit study. The general opinion was that such an institution should have some physical presence, perhaps in two or three major locations across Canada. One model for such an institution is suggested by the Australian Trade Union Training Authority, a statutory, publicly-financed, privately-governed body which offers advanced study for trade unionists.

Information has recently been made available about the development of labour studies programs at the community college level. In 1981, the Canadian Studies Office of the Association of Canadian Community Colleges submitted a funding proposal to the Office of the Secretary of State entitled, "Labour Studies: A proposal for development funds from Secretary of State to establish a comprehensive basis for Canadian-oriented materials and modules, instructional professional development and inter-agency co-operation". The proposal reported that 17 colleges had existing labour studies programs. Among those providing leadership in preparing the submission were representatives from Capilano, Humber and Niagara Colleges, all of which received federal contributions from the LEP. The submission requests funds in the amount of $975,000 over a three-year period.

The proposal appears to have been accepted in principle, although with drastically reduced funding. The proposed program could provide broader support for labour studies programs in Canada and might lead to the acceptance of such studies as a proper component of academic study, rather than being regarded as a reflection of the special interests of specific organizations. It would allow for the existence of a funding source which would be subject to different considerations than those which bear on the LEP. The proposal indicates that the national association would use monies to ensure that national concerns would be addressed, in addition to local concerns.

While no one could argue that the funds involved represent any absolute equity with respect to educational resources available to the labour movement in Canada, these proposed funds, with their contrasting origins, would allow some reduction in the pressure on Labour Canada to reinstate a general support program for community colleges with respect to labour studies. Labour Canada could then focus its resources on research and university level instructional programs.

There is no guarantee that this proposed new program would solve the antagonisms that remain between the labour movement and post-secondary education or that the needs of small independent labour organizations would be met as was intended by the original objectives of the LEP. There appear to be no factors in the ACCC proposal which run directly counter to the intentions of Labour Canada with respect to the original intentions of the post-secondary component of the LEP.

We believe that Labour Canada, in cooperation with the Secretary of State, should monitor the development of this program over the next three to five years to determine its overall effect on financial support from the Federal Government for labour education; and, in particular, to determine whether this proposed program has a multiplier effect similar to that arising from LEP-related activities.

Recommendation: Labour Canada should give consideration to reinstating, at the earliest possible opportunity, the program of contributions to post-secondary institutions. The continuing desire among members of labour organizations for opportunities for systematic advanced study of labour-related concerns should not be dismissed. Centres of excellence to promote studies and research of relevance to the labour movement in Canada should be encouraged.

Recommendation: Labour Canada should seek to find alternative means for fostering improved relationships between the labour movement and the educational system, with a view to increasing the access of labour organizations to the resources of post-secondary institutions.

TABLE 4-1

POST-SECONDARY INSTITUTIONS

Reported Labour Studies Programs, Distribution of Applications and Contributions Approved by Provinces.

Province	Post-Secondary Institutions	Labour Studies Programs	Applications 1977-78 With Programs	Applications 1977-78 Without Programs	Contributions Awarded 1977 - 78	Applications 1978-79 With Programs	Applications 1978-79 Without Programs
British Columbia	25	7	2	1	3	3	1
Alberta	21	2	-	1	1	1	1
Saskatchewan	19	0	-	1	1	-	-
Manitoba	6	2	-	-	-	-	-
Ontario	40	13	4	1	4	5	2
Quebec	50	3	-	1	1	1	1
New Brunswick	6	1	1	-	1	1	-
Nova Scotia	6	2	1	-	1	1	-
Prince Edward Island	2	0	-	-	-	-	-
Newfoundland	3	1	-	-	-	-	-
TOTALS	178	31	8	5	12	13	5
			13			18	

TABLE 4-2

POST-SECONDARY INSTITUTIONS

Contributions to Post-Secondary Institutions
1977-1978

Institution	Amount Requested	Amount Awarded	Nature of Project Teaching Credit	Nature of Project Teaching Non-credit	Nature of Project Research	Evaluation Conducted
Simon Fraser University	$ 36,000	$ 25,000	-	✓	-	yes
Capilano College	22,625	15,000	-	✓	-	yes
Northwest College	12,000	11,250	-	✓	-	---
Athabaske University	33,500	12,500	-	-	✓	---
University of Saskatchewan	1,142	1,142	-	✓	-	---
Confederation College	63,105	30,750	-	✓	-	---
Niagara College	37,700	20,000	✓	✓	-	---
Humber College	47,000	30,750	✓	✓	-	yes
University of Toronto Ontario Institute for Studies in Education	7,140	6,250	✓	✓	-	yes
Universite Laval	22,988	18,750	-	✓	-	---
University of New Brunswick	49.180	21,875	-	✓	✓	yes
Dalhousie University Maritime School of Social Work	90,595	12,500	-	-	✓	---
TOTALS	$422,875	$205,767	3	10	3	

TABLE 4-3

POST-SECONDARY INSTITUTIONS

Description of Projects

Simon Fraser University:	Hired trade unionist to expand Labour Education programs and evaluate current programs Developed programs and materials: Conference on Union Education Programs Conference on Paid Educational Leave Course materials on Financial Management Course on Practical Writing
Capilano College:	Developed five courses: Labour Law for Working People History of the Labour Movement in Canada Labour Economics Issues in Occupational Health and Safety Workers Compensation Act and Compensation Board
Northwest College:	Extended Workers' Education Program: Industrial Democracy Northwest Development Out of Work Course Northern Women's Course and Conference
Athabaska University:	Conducted research study for Alberta Federation of Labour to determine needs for program development
University of Saskatchewan:	Developed labour education courses: Participation of Women in Economy of Canada Other topics
Confederation College:	Contracted with local labour organizations as part of process to establish a Labour Studies Centre for Northern Ontario. Developed courses: From Contract to Contract: A study of Labour Relations in Canada Instructor Training Labour Law Labour-Management Cooperation and Quality of Working Life Conferences
Niagara College:	Developed courses and audiovisual materials: Union Leadership Occupational Health and Safety Collective Bargaining Process
Humber College:	Hired consultant and research assistant to determine needs in area of occupational health and safety for purposes of developing courses in Toronto area.

TABLE 4-3 (continued)

Ontario Institute for Studies in Education: Developed workshops:
- Labour Education in Canada
- Effective Training Methods

Universite Laval: Developed specific programs for four unions: Montreal Police Association, Quebec Nurses Professional Union, Quebec Police Federation, and Quebec Federation of Municipal Employees.

Courses covered various topics:
- Social Welfare Laws
- Union Organization
- Labour Relations Code
- Collective Bargaining
- Grievance Procedures
- Human Relations
- Negotiations

University of New Brunswick: Developed 20-week course: Labour in Canada

Compiled bilingual bibliography on Labour Education

Maritime School of Social Work: Conducted survey of trade unionists to determine needs for labour education in Nova Scotia.

TABLE 4-4

POST-SECONDARY INSTITUTIONS

Applications for Contributions for 1978-79

		Amount requested
British Columbia		
Simon Fraser University		$ 35,000
University of British Columbia		61,975
Capilano College		22,875
Northwest Community College		14,250
Alberta		
Mount Royal College		15,000
Grant McEwan College		34,950
Manitoba		
University of Manitoba		31,500
Ontario		
Confederation College		38,000
McMaster University		35,000
King's College, University of Western Ontario		19,600
Niagara College		30,000
University of Toronto (Centre for Industrial Relations)		18,300
Canadian Foundation for Economic Education		35,000
Humber College	Proposal #1	35,000
	Proposal #2	35,620
Quebec		
McGill University		24,000
Universite du Quebec a Montreal		41,000
New Brunswick		
University of New Brunswick Saint John	Proposal #1	800
	Proposal #2	1,100
	Proposal #3	330
	Proposal #4	1,450
University of New Brunswick Fredericton		31,350
Nova Scotia		
Dalhousie University, School of Social Work		35,000
Dalhousie University, Institute of Public Affairs		49,975
	TOTALS	$647,075

Section 2: The Bursarists

2.1 Background

The Bursary Program provides financial assistance to individuals and is the smallest of the LEP components amounting to 0.4% of total expenditures for the four years under review. It is the only component which requires that Labour Canada officials make qualitative judgments about proposed educational activities. Small as it is, the program suffered substantially from financial restraints imposed in 1979-80 when only $9,200 was distributed to two candidates who had held commensurate awards in the previous year.

The regulations governing the awarding of bursaries permit the granting of awards up to a maximum of $5,000 in any one year to individuals who must be fee-paying members of labour organizations: that is, organizations of employees governed by a constitution whose principal purpose is the regulation of terms and conditions of employment with the employer. Members of groups which support the labour movement by one means or another are excluded, as are employees of labour organizations who are not themselves members of a labour organization as defined above. Each application must be accompanied by written support from the labour organization of which the applicant is a member and by a specific proposal for either a program of labour-related studies to be taken at a recognized credit-granting institution or a research project related to specific areas of concern to the labour movement. Individuals are entitled to receive a maximum of $15,000 from the bursary component of the LEP, over a minimum of three years.

Over the four years under review, a total of fourteen individuals--three women and eleven men--received 17 financial awards. Most of the recipients were representatives from small unions in five provinces: British Columbia, Alberta, Saskatchewan, Ontario and Quebec. Two individuals received grants for two or more years. Distributions of grants and funds by provinces and years in shown in Tables 4-5 and 4-6.

Six of the fourteen individuals were involved in individual study programs at recognized post-secondary institutions: two in labour law, one in workers' education, and three in industrial relations. Two individuals carried out research projects, one of which was published in 1978.[14] Six individuals were awarded grants to attend conferences in the second year of the program. This practice was discontinued because conferences and workshops were viewed as non-credit programs. In the third and fourth years of the Program, applicants proposing to attend non-credit programs were informed that they could apply for assistance through the program of grants to independent labour organizations. In 1980-81, three such applications were rejected on this basis. In each case, the amount of funds which would have been made available to the independent labour organization of which the individual was a member would have been too small to be of much assistance to the individual making the request. Only one individual was unable to complete the program of studies for which funds were granted and the balance of this grant was returned to the LEP.

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[14] W. Johnson, The Trade Unions and the State. Montreal: Black Rose Books, 1978.

2.2 Survey of Bursarists

In 1981, we attempted to interview by telephone all individuals who had applied for bursaries, both successfully and unsuccessfully, in the third and fourth years of the Program. Among the ten applicants interviewed, all indicated an intention to remain associated with the labour movement in Canada, although not necessarily as members of labour organizations. One unsuccessful applicant is now employed as a member of management with responsibilities for industrial relations and one successful applicant is now practicing labour law with an independent firm.

Both successful and unsuccessful candidates reported a number of concerns with the application and renewal processes. One such concern related to factors of timing. Some educational institutions do not provide the necessary information about acceptance or grades attained until after the closing date for applications to the LEP. Labour Canada might consider instituting a longer lead time for applications, even though this might inroduce some discomfort with respect to individuals not being informed whether they had been awarded financial assistance until the start of succeeding academic sessions. It might be wise to divide the available funds into two portions, one for early applicants and one for those who have signalled their intention to apply but cannot supply the necessary documentation before the deadline date.

Applicants indicated they had heard about the bursary program through a variety of sources, although most reported receiving the information from a labour organization. The main dilemma with respect to publicizing the program more widely is that the total amount of funds available is very small. With increasing numbers of individual applicants, there is likely to be an increasing number of disappointed applicants. In the first two years of the program five applicants (30%) were unsuccessful and in the second two years seven applicants (58%) were unsuccessful.

Since the introduction of the bursary program, the application form has been revised in order to improve its clarity. However, it still contains a serious ambiguity for many applicants. The fact that the proposed educational program must be "for credit" is not specified early enough in the application form to prevent serious misunderstandings.

Recommendation: Labour Canada should review the application forms for the bursary program with a view of clarifying the guidelines for proposed courses of study for credit.

All but one of the successful candidates reported having fulfilled or being in the process of fulfilling their proposed program of study or research. One candidate could not complete the proposed program because of family concerns and returned the balance of the grant to Labour Canada. During our telephone interviews, various candidates indicated that they were satisfied with their personal development and that they felt confident that they would be more effective members of the labour movement in the future. They indicated that their major learnings have been in the areas of individual and interpersonal skills and knowledge. This emphasis reflects the nature of the educational programs being supported which have invariably removed the individuals from immediate participation in labour affairs and exposed them to a learning environment with a broad focus and to fellow students from widely different backgrounds.

2.3 Future Concerns

The bursary program has so far supported two candidates for long-term study extending over three years and is currently supporting one additional candidate. While we agree that individuals with ambition and capacity for long-term study should be supported, we also note that such support has encumbered over half the funds of a very small program. These three candidates have been successful in their studies and appear to be credit to the program. Two were involved in the study of labour law and one was studying at Ruskin College, Oxford. This latter candidate was successful enough to be invited to enrol in the regular undergraduate program which he is now completing.

We believe that in the future Labour Canada might consider some alterations in the present procedures. First, when a student has been supported for more than one year, Labour Canada should make personal contact with that individual to ascertain the quality of overall development and the individual's plans for the future. Second, when long-term support is involved, the individual should be assisted and encouraged to find additional funds from other sources. Third, the present ceiling of $5,000 for one year of study has been substantially eroded by changes in the economy. If it is the intent of Labour Canada to provide adequate support for full-time students for more than one year, then this ceiling must be reconsidered.

During the first four years of the LEP, it has become clear that decisions leading to long-term funding of a few individuals have conflicted with the possibility of funding many individuals on short courses or programs of research. Since the bursary program is becoming increasingly visible, more applications are being received each year. The quality of completed work has been high but an increasing number of qualified--but rejected--applicants may be too costly in terms of government-labour relations. The intent of the program, therefore, should be clarified and made more explicit.

Recommendation: Labour Canada should clarify the intent of the bursary component of the LEP and should give serious consideration to increasing the total amount of funds available for bursaries and the total amount of funds available to any one individual in one year. Guidelines should be established which more clearly define the intent of the program in terms of offering support for long-term or full-time study, for short courses, and for research projects or the development of educational materials.

..e must also note that several individuals have received financial assistance from the labour organizations of which they are members, and that in some cases these funds were part of funds obtained by the labour organization through the LEP component making grants to independent labour organizations. We believe that this type of support might more properly be a function of the Bursary Program.

Within its limited budget, the Bursary Program appears to be succeeding. The chosen candidates all appear to have been able and industrious. No unavoidable failures or drop-outs have been reported and some results have been impressive. It is too soon to tell what contributions these individuals will make to the labour movement and ultimately to the objectives of the LEP, but it appears that even the small allotment for support to individual programs has been a productive decision.

We believe that this program should continue in future Labour Education Programs, that the total allotment of funds should be increased substantially, and that the program should be evaluated as an example of the support provided directly to individuals for the achievement of educational objectives.

TABLE 4-5

BURSARY PROGRAM

Summary of Value of Bursaries Awarded

Province	Year I 1977-78	Year II 1978-79	Year III 1979 -80	Year IV 1980-81	Totals	Number of Individuals
British Columbia		$ 679 700 700 694 663			$ 3,436	5
Alberta	$ 5,000	$ 2,190	$ 4,200		$ 12,342	3
Saskatchewan				$ 5,000	$ 5,000	1
Manitoba						
Ontario	$ 5,000	$ 5,763	$ 5,000		$ 15,763	2
Quebec		$ 2,200		$ 5,535	$ 7,735	3
New Brunswick						
Nova Scotia						
P. E. I.						
Newfoundland						
Yukon & N. W. T.						
TOTALS	$ 10,000	$ 14,541	$ 9,200	$ 10,535	$ 44,276	14

TABLE 4-6

BURSARY PROGRAM

Summary of Applications and Awards for LEP Bursary Program
Years I & II (1977-1979) and Years III & IV (1979-1981)

Province	Applications received		Accepted		Rejected		TOTALS		Nature of Project
	Years I & II	Years III & IV	Years I & II	Years III & IV	Years I & II	Years III & IV	Awards	$ value	
British Columbia	5	0	5				5	$ 3,436	Conference (5)
Alberta	3	1	3	1			4	12,342	Conference (1) Research (1) Study (2)
Saskatchewan	0	1		1			1	5,000	Study (1)
Manitoba	0	0							
Ontario	5	3	3	1	2	2	4	15,763	Study (4)
Quebec	3	5	1	2	2	3	3	7,735	Research (1) Study (2)
New Brunswick	0	0							
Nova Scotia	1	2			1	2			
P. E. I.	0	0							
Newfoundland	0	0							
Yukon & N.W.T.	0	0							
Sub-totals	17	12	12	5	5	7			
TOTALS	29		17		12		17	$ 44,276	Conference (6)[a] Research (2) Study (9)

Notes: [a]No Bursary requests for attending conference workshops were funded after Year II of the program.

CHAPTER FIVE

A Review of Educational Resources

One component of the various educational activities reported on by recipients of federal funding through the Labour Education Program was the development and utilization of educational resources. In many cases, the labour organizations opted to create their own resources rather than purchasing these from external sources. This chapter attempts to review some of the resources which were both developed by the labour organizations themselves for their own use and purchased for use in specific types of educational activities.

Historically, labour education has been predominantly a matter of short-term responses to immediate problems. Primary attention has been focused on the conjunction of instructors and students under a wide variety of circumstances and conditions. There has been little time, and extremely limited resources for the provision and development of teaching supports. The early investment by the CLC and the Teamsters in videotape systems, and of the former in appropriate facilities, suggests the presence of a serious commitment to the development of effective and contemporary materials.

Two major factors affect the need to produce unique materials. The first factor concerns the experience to be transmitted and the form in which it must be transmitted to a particular audience. With respect to the tool materials, such as those represented by the Shop Steward Manuals and the manual for the course on Collective Bargaining, there can be no question of the specific need. No other segment of society engages in such activities, and there is no evidence that commercial publishers could or should provide such materials. However, even with general materials such as some audio-visual resources, it is apparent that they would not be available at all if they were not made available by labour organizations. Second, there is the question of ideology, of the point of view from which information is presented. Several reviewers draw attention to the salience of the point of view of the materials and acknowledge its importance.

The development of teaching materials requires considerable expertise and the end results are always subject to criticism. All the reviewers are critical of some aspects of the discrepancies between intended goals and actual outcomes, and all have attempted to give a fair and balanced assessment of the material reviewed. Given the history of labour education, we believe that any improvement in the provision of manageable, attractive, usable and easily accessible materials is an achievement.

Finally, the question of duplication is, to a large degree, a reflection of the organizational nature of the labour movement itself, consisting as it does of many organizations with different histories, different structures, different philosophies, and different circumstances. Each of these characteristics in turn breeds different styles, different approaches and different needs. For most of the courses produced by the LESC, new materials are now being used in a wide range of experiences for participants from different labour organizations. Even in such apparently common areas of collective bargaining or shop steward training--areas in which an outsider is tempted to perceive enormous duplication--all of the factors noted are likely to result in the production of similar materials with different purposes and uses. In these cases, the LEP may be able to give advice with respect to design, development, testing, and techniques of production.

The circumstances of the labour movement are such that almost all of the materials in question must be utilized in courses of very short duration. Knowledge and skills often have to be communicated and practiced in five days, the most common length of a workshop or course throughout the LEP. Workers in educational programs rarely enjoy the luxury of extended practice sessions or time for study and contemplation.

The resources vary so greatly from organization to organization that generalizations about the overall results are difficult. It is our opinion that the print materials produced were generally of higher quality and more likely to be of long-term use than the audio-visual materials. One reason for the higher quality in the print materials may be that they can be revised more easily than audio-visual materials. Another may be that it is easier to identify and edit out inappropriate portrayals and stereotypes in print materials than in audio-visual materials. A third reason may be that educators in general, and labour educators in particular, have not yet had enough experience to utilize the various audio-visual media to their full potential. As time passes, various labour educators will develop such expertise and it is our hope that such skills will not be lost to the labour movement.

Recommendation: Labour Canada should develop a library of resource materials drawn from those which have been developed and used in labour education activities and should encourage cooperative efforts among labour organizations by which the expertise which has been developed by various labour educators in the past four years can be shared throughout the labour movement in Canada.

The reviews which follow include: a review of the steward training program and distance learning materials developed by the Hospital Employees' Union of B.C.; a review of the print materials developed by the Christian Labour Association of Canada; a review of th materials developed and used in the Collective Bargaining, Arbitration; a comparison of a selection of Steward Manuals from an independent labour organization, the Teamsters and the Congress; a review of the slide-tape kit "The Steward; and brief reviews of audio-visual materials from the LESC including "Right to Survive", "Art of Cross-Examination", "Why? The Perfect Union", "A Clear Cut Case", and "Collective Bargaining". The reviews were carried out by individuals who were knowledgeable in the areas of resource development and labour education.

Before moving on to specific reviews, we must comment on one problem which seemed recurrent throughout all the educational resources. Our description of this problem focuses on materials from the LESC. However, our concern should be viewed as being a potenital problem for all those involved in resource development.

Four reviewers examined materials used by the LESC in two courses; Collective Bargaining and Arbitration. Wherever possible we asked reviewers to deal with print and audio-visual materials as a unit. The materials provided for the Collective Bargaining course included four videotapes which were produced by the Media Centre of the University of Toronto for its Industrial Relations Centre. It was these videotapes and the way in which they were used in the course material which disturbed our reviewers.

The reviewers felt that "something was missing" as they reviewed the materials. They came to the conclusion that the videotapes had been designed for use in both union and management training programs. In the Collective Bargaining tapes, the management negotiator is clearly portrayed as the "hero". In the portrayal of the role of the union negotiator, the individual appears to compromise the union position. A bargain is agreed to over a private dinner; and the union negotiator agrees to accept management proposals without holding a union caucus and to accept management's written version of matters which are agreed on verbally. The reviewers questionned whether this type of portrayal of a union negotiator constituted "good union training". They continue: "To its credit, the LESC manual accompanying the course materials attempts to deal with these embarassments, but manages to do so in an apologetic manner."

The same set of tapes portrays a female member of the negotiating team as an extremely poor role model for other female union members. In the videotape, the woman is treated poorly by her male counterparts and vanishes mid-way through the series of tapes. The reviewers continue: "To its discredit, the LESC manual adds to this problem by stating that 'unemployment adversely affects negotiations and therefore unless the union is strong, employers will save money by employing women, temporary workers and part-timers doing the same job for less money' (p. 15 of the Collective Bargaining Course Manual)."

A set of videotapes produced by the Centre for Industrial Relations on arbitration portrays the female grievor as hysterical and irrational. The reviewers agreed that the Congress and the LESC should not be contributing to such negative stereotypes of female union members by using this material in educational courses without providing adequate opportunities to discuss the ramificatons of stereotyping of this type.

Finally, the reviewers objected to the fact that, in the Collective Bargaining Manual, while questions were provided for open discussion on the basis of being questions without "right" answers, the leaders's version of the manual does provide "right" answers. We have assumed that most instructors would have too much integrity to settle for the limitations of the "right" answers provided, but we cannot be absolutely sure that our assumption is not based on wishful thinking.

We have attempted to provide the reviews which follow in the words of the reviewer, although we have done some editing. The reviews are followed by a listing of all the print and audio-visual materials which we could attribute to the production facilities of the LESC. We caution the reader that the list is incomplete.

Media Evaluation: Report from an Educational Media Developer/Consultant

The following materials, produced by the C.L.C., were submitted to an independent producer of educational media for his evaluation:

Right to Survive: slide presentation--basic information on health and safety
Collective Bargaining: 4 videocassettes--simulation of a bargaining session
A Clear Cut Case: videocassette--procedures for filing a grievance
Why?: videocassette--the NDP and the labour movement in Canada
Art of Cross Examination: videocassette--dramatization of cross examination procedures

The evaluator's overall reactions to the set of materials may be inferred from his letter which accompanied his review:

> "I found it impossible to compare these to other resources. Although I have seen quite a few labour productions, most have been aimed at more than just an in-house audience, and as a result, more popular in style. With the exception of 'A Clear Cut Case', the materials I saw point out the need for an approach that will involve, inform and even entertain people, as opposed to an approach that is more like taking medicine that is 'good' for you."

The evaluations of each of the titles follow.

Title: Right to Survive

one slide tray, audio cassette (15 min.) and script (80 slides)

Content: Deals with health and safety.

Statement of Objectives: The program attempts to survey:
1. Human and financial costs of health and safety crisis.
2. Modern health and safety dangers.
3. Labour's strategy.
4. The law on health and safety.
5. Collective bargaining on health and safety.

Technical Characteristics: An excellent, tightly written, well paced, attention holding blend of audio track and slides.

Comments: This is an outstanding example of an educational program. It has a clear set of instructional goals, set out clearly in the script, well written and narrated, accompanied by graphics designed to capture attention and consolidate learning. This is a model--an excellent synthesis of printed materials, script, discussion notes and visuals.

Title: Collective Bargaining

3/4 inch videocassette, 4 tapes: 40 min., 40 min., 45 min., 25 min., colour

Technical Characteristics: Considering the constraints of filming six people at a table, the camera work and sound are fine. The overall effect of this kind of presentation, regardless of how realistic it is, is tedious to watch in part or all at once as there are few diversions from the constant bargaining. The acting was realistic with the company negotiator offering by far the best performance, providing the only bright spot in an otherwise tiring production.

Title: A Clear Cut Case

3/4 inch videocassette, 18 min., colour

Content: This video is about a typist's grievance over job classification in an office setting . It shows the correct procedures that should be followed and emphasizes the need for following them.

Statement of Objectives: The objectives are made clear by the content of the videotape: to show when and how to file a grievance, and the need of the griever and steward to stick to their guns to uphold the contract and not to let the griever or union down.

Technical Characteristics: The acting in this production is realistic, absorbing and exciting. The camera work is professional and the sound is also of good quality and imaginative. This will be a popular educational tool as it is well scripted and produced.

Comments: An enjoyable resource to watch and see used, made by people who are effective communicators as well as being skilled producers. This videotape should be of use to many unions for some time as it will not quickly date and will have broad appeal.

Title: Why? The Perfect Union

3/4 inch videocassette, 13 min. 26 sec., colour

Content: The content of this tape consists of the statements of New Democratic Party leaders such as Broadbent and Blakeney, and statements by labour leaders such as Cliff Pilkey, Paul Forder and Denis McDermott on why the labour movement in English-Canada supports the NDP, and why they are increasing and formalizing this support.

Statement of Objectives: To make clear why the C.L.C., its affiliates, and the NDP are the perfect union.

Technical Characteristics: This tape consists of single camera shots of talking heads, interspersed with shots of newspaper clippings and posters. As a document it is perhaps a fair presentation of the content, but is unimaginative in presentation.

Comments: The people filmed on stage and those interviewed are committed and persuasive but the material will probably date quickly. As an educational tool that relies on the opinions of leaders only, it is perhaps of more interest to committed followers than a general audience. This appears to be a hastely put together piece for an election.

Title: Art of Cross Examination

3/4 inch videocassette, 35 min., colour

Content: A dramatic presentation of a journalist's grievance, introduced and hosted by Stephen Lewis.

Statement of Objectives: Stephen Lewis introduces this as a program on labour arbitration dealing specifically with the process of cross examination, and how it is essential to discovering the truth.

Technical Characteristics: Both the camera and sound are of good quality. The format is somewhat limited by the subject matter but Stephen Lewis' role as interpreter helps considerably.

Comments: I can only assume that this program is designed for labour lawyers or students of labour law, as the average labour rep. or steward should not be expected to become as skilled as a lawyer. Stephen Lewis acts as an interested and lively host, essential to attract and keep attention to what could be a tedious program. The detail and complexity of the material could very easily intimidate the novice. Whether you win or lose does not seem to depend on whether the union or management is right or wrong but who is the most skilled in cross examination and best prepared. This is a useful resource for students comfortable with the subject matter, and likely to remain so for some time.

Media Evaluation of the Slide-Tape Kit "The Steward"

This slide-tape presentation is based on the CLC publication "A Manual for Stewards". This document has already been reviewed in this chapter in comparison with similar materials prepared by the Teamsters and the CLAC. The documentation which accompanies this presentaion, described as "Instructor's Notes" which make it clear that the slide numbers are keyed to pages in the CLC Manual. The notes offer nothing else by way of explanation or directions as to how the visual materials could/should be used.

The audiotape consists of a series of audio pulses for use as signals to change the slide being projected. There is no other dialogue or commentary provided. Thus the burden of instruction falls on the slides themselves plus any interaction which an instructor might have with his/her class or seminar.

The visuals include 143 35mm slides. Each slide consists of a white line drawing or white print on a solid, relatively bright, blue background. Of the 143 slides, 27 consist of words only and 106 consist of a combination of words and simple illustration.

The effect of viewing the slides at the pace indicated by the pulsed tones, approximately 7 seconds apart, is difficult to predict. But it should be noted that whereas some slides contain as many as seven different concepts, others contain a single discrete concept of only two or three words. We suspect that without the intervention of the facilitator/instructor, the pacing would be hypnotic, allowing too much time for some slides and not enough for a full reading of others (even though the longer ones are primarily synopses of those which have preceded them).

A comparison of the text of the slides with that of the manual indicates that there is no new material in the slides. The highlights of the text, without elaboration, are presented in the slides.

There is little information available from the CLC to indicate why the "Kit" was produced, who it was intended for, and how it has been employed and for what purposes. Our comparison of this method of presentation of information with the potential uses of slide-tape presentations, in general, suggests that while technically "clean" and straightforward, this presentation would do nothing to capture interest, sustain motivation, or enhance the meaning of any of the material presented.

We were able to identify two trainers who had ordered this kit and were able to contact one who provided us with additional information. He reported that on its arrival, the kit did not contain the audiotape but that this did not present him with any difficulty because of his own method for using the slides. He used it with a group of 20 participants, all very new to the role of shop steward, at a workshop on the rights and responsibilities of shop stewards. The slides were projected in a semi-darkened room with a running commentary "off the top of my head" by the facilitator. Those present were encouraged to ask questions and make comments. In what was termed "the safety" of the darkened room, the communication opened up, and the facilitator reported that by the end of the presentation a "very good feeling (existed) among the men." The facilitator commented that: "My purposes were well-served by the slides. They provided a real ice-breaker."

We have been unable to obtain a breakdown in the costs of producing and reproducing this slide-tape presentation. Our estimate is that the master copy would have cost under $2,000 and that each reproduction would cost about $100. These costs are based on estimates made by producers of commercial (and competitive) media. The cost of producing media at the CLC is not broken down by individual productions in a manner which indicates labour costs. The production cost of this kit was reported to us as being $500, without any indication of the itemized costs included in this figure.

Media Evaluation: Report from a Staff Representative of a Large Canadian Union with Experience in Processing and Teaching Grievance and Arbitration

The following materials produced by the C.L.C. were submitted to an independent consultant for review:

Student's Workbook (122 pp.)
Instructor's Manual (515 pp.) for the Arbitration Course

The reviewer assumed that these manuals would be used mainly by staff representatives of unions. When asked to consider whether stewards could use these manuals, the reviewer thought the materials beyond the level at which many stewards would function because of its extremely legalistic focus.

A. Instructor's Manual

Lay-out is the lay-out satisfactory?
The lay-out of the course and the print are excellent. It is very well organized and flows smoothly. The material includes not only a Table of Contents which is indexed to the material, but a Schedule, Introduction and a Checklist for the Instructor. Both the Schedule and the Instructor's Checklist are valuable assets which would assist the Instructor to plan and prepare in advance, both the daily content and the material needed.

Format is the size appropriate?
The course is designed to be taught over a six-day time frame--commencing Sunday evening and continuing until Friday at noon, with only one free evening. I feel this may be too intensive due to the content of the material and the amount of preparation expected of the participants. I would rather see the course broken down into shorter time frames, i.e., a three day course on "The Art of Cross Examination", and another two or three day course on "Presenting the Argument, etc.". A shorter time frame concentrating on each separate part of the course would allow more flexibility.

Content is the content comprehensive?
It is consistent all the way through in its attention to detail. The suggested resource material is excellent and includes the leading texts on arbitration and contract clauses.

The exercises are meant to train union advocates how to prepare for and present grievances at arbitration. Also to find out what the arbitration law is on a given point, how to examine and cross-examine witnesses, and how to prepare and present an opening statement and final argument. To this end, the course and the material would be successful.

The course also stresses the needed ability to change your course of action by being prepared for all the angles that the other side might use.

The emphasis is on learning by doing, and of course, critique in the process is important. I like the fact that the instructors are advised that comments should be in the form of positive hints. Also that the instructors be cognizant of the kind of group they are instructing, and that the participants will have a natural fear of being criticized in front of their peers.

I also like the fact that each part provides questions to be discussed at the end of the exercise. This would be the time to point out mistakes in the context of a training course and the effect such mistakes could have at an actual hearing. Further, the discussion provides an opportunity to discuss how a certain component works, both by itself and in relation to others, i.e., in Part 2, one of the questions to be discussed is, "What kind of information should be gathered for grievances?", one can readily see how that information will lead to other parts, i.e., Part 4--Examination and Cross Examination of Witnesses.

Content   is the content intelligible?
YES--the content raises the necessary questions and then answers them through discussion and the material provided. It goes on to show through the exercises, the practical application of the relevant principles, i.e., arbitration law and how it effects the drafting of contract language.

Adaptability   is the material adaptable to a wide range of teaching situations?
I would say the course has limited adaptability. The best surroundings would be residential, preferably removed from the enticements of a big city, largely due to the amount of "own time" preparation the course demands of the participants. I would suggest that the course could and should be broken down into smaller modules.

Compare   how does this material compare with material previously used for this teaching purpose?
To the best of my knowledge, this is the first course on this subject, to be used in teaching union representatives.

Will the material become dated   can it be easily updated?
The basic skills taught by this material will never become dated: i.e., "the how to/learning by doing" concept, how to prepare, how to cross-examine, etc. The body of arbitration law is constantly changing, as is legislative reform, but this course uses arbitration law and legislation as reference tools in the exercises. Because of this, the specific arbitration law or piece of legislation referred to, can easily be substituted by a more recent decision or changed piece of legislation.

Does the material trust the instructor   would this material be useful to inexperienced instructors as well as experienced?
My answer to the first question is yes, because my answer to the second question is no.

The course is quite specific in the outline that it is intended to be given by two instructors experienced in both advocacy and labour arbitration. The course provides for the instructors to lead group discussion often based on their own experience and firsthand knowledge. They are also called on frequently to give demonstrations on various techniques. The other demanding role, that can only be performed by an experienced instructor, is that of critic.

In order for the criticism to be received in the light in which it is given, it is important that the participants have a healthy respect for the instructor's knowledge and experience. Otherwise the comments on a participant's performance, no matter how positive or helpful, will likely fall on deaf ears, therefore, defeating the purpose of the course.

Objective is the objective of the material achievable?
I believe the stated objective of the material is achievable. The course is designed for maximum participation by the individual participants. For this kind of training the best way of achieving the necessary skills is through the learning by doing concept. One can read how to present a final argument, but only by actually preparing and presenting a case can one see the problems that might arise and familiarize oneself with how to deal with them. I think the material teaches the necessary techniques and also how to change approaches if necessary. The material also provides detailed "check lists" which would greatly assist the participants in the practical exercises.

As an overall impression, I would say that from an instructor's viewpoint I find the course:

1. Well thought out. The material is well laid out, well explained and easy to follow.
2. The contents are relevant, up to date and follow an orderly sequence.
3. I also like the fact that apart from the "Instructor's Notes", the participants are provided with the same material, which of course assists the learner to know what he/she is to learn. This greatly helps an instructor.

B. Participants' Course Guide

In general, the comments with regards to layout, format and content are the same as those I made for the instructors' manual. The material, with the exception of the "Instructor's Notes", is identical. The reservations I expressed over the amount of material, and the comprehensive nature of the material and the ability to absorb so much over a relatively short period of time, remain the same.

I would like to make one additional comment. The level of skill of the participants will of course vary. By breaking the course down into particular modules, someone who is confident in preparing the case, but not making final argument, could then register for a course directly relating to their need rather than sitting through a day of skills training in an area where they don't need it.

I believe the learners would achieve a greater understanding of the process by this material. In fact, just by reading the material the participants knowledge of the arbitral process will widen. When we apply the knowledge contained in the material through a mock arbitration exercise the skill factor of the participants should improve. The group discussion at the end of each exercise is of particular value because the questions suggested are relevant and in fact, are a mini-review of the process just completed.

As happens in actual cases, the other side has some piece of information you don't have, and you may not know they have it. By experiencing this firsthand, the learner has a very graphic picture of what can and does so often happen in arbitration.

The checklists provide an overview of the concept, and also explains the "why" of the particular approaches suggested. In other words, the checklists suggest: what to do; why to do it; and what could happen if you don't, thereby supporting the approach with the facts as they exist. A very helpful piece of material!

Speaking from a purely personal viewpoint, I was a participant in this course approximately one year ago. Some of my comments, in fact most of them, are based on actual observation. The kind of group this course is designed for should be borne in mind. Most of us already have some experience in grievance and arbitration advocacy, and our own preconcieved, sometimes erroneous, impressions of what the arbitral process is all about. This is often based on what we have gotten away with in earlier situations.

For myself, I found the course to be quite enlightening, and often fascinating. The instructors we had were top labour lawyers, well respected in their field and very knowledgeable. The material was well explained and the learning process, while informal, was often quite competitive. When the exercises were handed out for the mock arbitration case and the learners assigned sides, the level of activity in preparing their respective cases was intense. Some of the participants, myself included, were up most of the night pouring over the relevant L.A.C.'s and the rest of the documentation provided. While I had had some limited prior experience in arbitration cases, i.e., the preparation and presentation, I found the material assisted me to feel fairly confident that I had covered all the angles. Of course when we started, I found I hadn't, but with reference to the material I was able to recover and in the process my own confidence about handling that kind of situation was strengthened.

During the time I have been reviewing this material I have also been involved in a complicated arbitration case. The material has been invaluable in assisting me to prepare for that case and to have confidence not only in the case I have prepared but in the presentation of that case.

In closing I want to stress that I have been both a participant and an instructor in a number of labour oriented courses designed for adults, ranging from Basic Shop Stewards Training, Parliamentary Procedure, Economics, to Political Science and Sociology. The material in this course, the layout, the references, are the finest that I have ever had the pleasure to work with.

I would rank this course as an advanced course. The learner should have some basic knowledge of the grievance and arbitration process to be able to make maximum use of it. I would most definitely spend my own money on this material and would go one step beyond that and suggest that the learner's manual should be part of every union representative's basic equipment. The material would be very useful on an almost daily basis in my union, and could and would be put to maximum use by myself and my colleagues.

I would also like to express the feeling that my skill level in this area has definitely improved, both by being a participant and also by having the more recent opportunity to review the material.

Media Evaluation: Report from a Consultant on Community Education with Experience as a Shop Steward and Chief Negotiator for a Local of a Large Canadian Union

The following materials were submitted to an independent consultant for review. The print material was produced by the C.L.C.; the videotapes by the University of Toronto Media Centre for the Centre for Industrial Relations:

Course Manual on Collective Bargaining (112 pp.)
Videotapes accompaning the course outlined entitled:
The Preparation
The Bargaining (Parts A and B)
The Outcome

These videotapes were reviewed for content relevant to the course. The same tapes were also reviewed by a media developer/consultant. This review is included elsewhere in this report.

Introduction

I begin with a very specific bias: the purpose of labour education is to increase the opportunity for union members to experience their power, increase their understanding of their situation, and use these experiences and insights to build a strong democratic movement. I was therefore concerned with whether the material I evaluated presented new information; helped the learner develop new skills; gave an opportunity to exercise these new skills and draw on new insights; affirmed the value of the learner's experience; and suggested ways of increasing involvement in union activity.

Definition

The emphasis in collective bargaining and the negotiating process varies with politics and philosophy. One approach emphasizes the technical aspect and views it as a specialized task requiring highly skilled participants; the other holds that it is essentially a political activity in which direct involvement by local members is paramount.

The message of the manual and tapes is that collective bargaining and negotiation is a highly specialized discrete activity done by skilled experts with particular knowledge. The manual addresses primarily the transmitting of information and techniques. Its stated aims are: "to teach negotiators what to expect; to help them avoid elementary but common mistakes; and to encourage local negotiators to have confidence in their own abilities and, through the course materials, show them they can overcome their limitations."

The material deals with several aspects of collective bargaining and falls roughly into three categories:

1. the definition and purpose of collective bargaining;
2. the factors which affect and shape collective bargaining; and
3. the mechanics of negotiations.

The material does not consider negotiating as direct political activity for rank-and-file union members. It gives little attention to the role of the membership, the accountability of negotiators to the membership, or the development of support within the membership. I think these are serious omissions which result in the neglect of grass roots involvement and democratic learning.

Methodology

The methodology is consistent with the message of the material. The intention is to make the material in the manual student-centred, and the format for most activities is small discussion groups. The manual suggests to the instructor that there are no right answers to many of the questions posed for discussion, and that the responses will vary with the circumstances in the local. However, the manual then goes on to provide answers to all the questions formulated, including those that are clearly open-ended and debatable. It makes no distinction between straight factual information, as distinct from values, opinions, and philosophy.

Although the instructor is advised in the introduction to ask students what they want to get out of the course, and what their union experience has been, the manual does not suggest ways for eliciting feedback from students or exploring their needs. There is little time to practice skills or examine contentious issues, and there is no recognition of the personal needs of those in a negotiating situation which requires workers to confront employers as equals.

The manual is so structured that it provides a time frame for each section of the course. One striking example illustrates the attitude implicit in the manual toward empowering the learner, as well as the worker. Sections 10 and 11 deal with costing and calculating COLA and require an ability in basic mathematical procedures. The manual advises the instructor that unless most of the class can do these operations, these Sections are not worth doing. If the intention of the course is to develop independent negotiators with "confidence in their own abilities", then learners must be given the tools they need and the course should accomodate this.

Use of the Manual

Given the methodology and aims of the manual, I think the best sections are those that deal with the mechanics of negotiating, Parts 3 and 4. There could be additional opportunities here for more varied kinds of student participation; for instance, more exercises in drafting clauses and more role play exercises. Overall, these sections are very useful.

The "Criticism of the Course" at the end can easily be revised and expanded into an "Evaluation" to include questions about various aspects of the material, the learners' needs, the methodology, and the role of the instructor.

Recommendations

The manual accomplishes what it sets out to do: transmit (although not in a very interesting or involving way) certain information and techniques. But the emphasis on technique and the reliance on experts, whether it is the staff representative in negotiations the N.D.P. in the political arena, does not empower workers or learners, does not provide opportunity for skill development, political understanding or action and, in the end, reduces the role of local negotiators to that of informed observers.

Students will not come away with confidence in their own abilities, but with a heightened sense of their limitations. Substantial additions should be made to the manual. The issue of the role of the membership should be expanded. It is not sufficient to say that the best way of finding what the membership wants is to have well-run, well-attended meetings. The issues of input, feedback, communication and accountability are crucial to democratizing the negotiating process. Deletion of these issues implies a lack of importance.

If the team is to operate democratically, team members need to experience working cooperatively as equals. Cooperative work is rare: it does not occur in the workplace nor does it occur in schools. The union is one place that can provide this opportunity and it is one of the features that characterizes union activity. But workers need a model for cooperative work as well as the interpersonal skills for cooperating. A section in the manual could provide discussion and exercises on this topic. There also needs to be discussion of collective bargaining as political activity, so that learners will see its use in extending, not containing their power.

If workers are not entrusted with responsibility for negotiating their own contract, how are they to be entrusted with responsibility for the workplace?

The Role of Women

A word about the role of women in this material. There is one reference to women in the manual, and this is in terms of their use as a cheap labour source and a threat to union security. There is no attempt to explore this question, or to suggest that the remedy is to include women and demand equal treatment.

The videotape shows one woman on the union negotiating team, speaking to the issue of flextime in a negotiating session. I don't know whether it was symbolic but, half-way through the tape, this woman disappears from the team, without explanation, and flextime is dropped as a demand.

Videotapes

I want to comment on the videotapes separately. I think that despite the flaws in the manual it can be revised and amended to serve as a good resource. I don't feel that way about the tapes. They are slow moving, boring, and present examples of the very behaviour that serves management's interests. If one were to measure the importance of various aspects of collective bargaining from the representation in the tapes, the role of the membership would be a negligible factor; the meetings with management, the most important. And in face-to-face negotiations, it is the experts who are central; that is, the staff representative and the management spokesperson. When talks break down the management spokesperson arranges a private meeting with the staff representative and they make a deal over dinner. This incident represents an example of undemocratic, management-defined behaviour. All through the tapes we see parallels between the management approach and the union approach. Nowhere are unionists distinguished from management.

Although the manual makes reference to the strength of the union and the power workers have in acting collectively, the tapes show successful negotiation solely in terms of technique. It is ironic that the management spokesperson uses the threat of strike to bring his management colleague into line. This emphasis on technique is so strong that in the answer to the question in the manual, "Who is the most capable negotiator?", the answer given is the management spokesperson who is "a master of understatement, evasion, innuendo, denying that issues are linked when they are, and controlling the negotiatons to his own advantage". The final comment laments the fact that this man wasn't on the union side.

As a worker, my own experience of negotiating was exciting, exhilarating, and demanding. I experienced, directly, the power that workers have when confronting management through the union, and the necessity to keep in close touch with the source of that power--the membership. The videotapes reflect none of these experiences. I cannot imagine why anyone would want to negotiate after seeing these tapes.

Media Evaluation: Report from an Educational Historian

A selection of materials produced by the Christian Labour Association of Canada (CLAC) were submitted to a historian with an interest in educational activities in the labour movement. The materials are identified in the report which follows.

A brief look at the Christian Labour Association of Canada as publisher.

Any labour association that publicly bases its operation on the Christian principle of "social justice and love as taught in the Bible" is certain to find itself in a minority position in today's workaday world. That the Christian Labour Association of Canada has managed to survive as an independent labour union since its formation in 1952, despite the active opposition of the Canadian Labour Congress, is evidence of the strong sense of mission felt by the small number of European immigrants who began the Association and by the growing number of others who have been attracted to it because of its basic philosophy. Still a relatively small labour organization (its membership is less than 10,000 with locals in Ontario, Manitoba, Alberta and British Columbia), the CLAC has a readiness to proclaim and defend its position on a variety of work-related issues and problems, especially in the pages of The Guide, the official publication of the Association.

The Guide is issued ten times per year and is intended largely for Association members. Its articles, editorials and reviews are of high quality and may be read by anyone interested in the world of labour, whether or not the reader shares the Christian perspective of the writers. Like other CLAC publications, The Guide offers well researched and challenging analyses of problems; there is no attempt to take a simplified or sensational approach to the matters discussed. Indeed, one of the books published by the Association, namely Harry Antonides' Multinationals and the Peaceable Kingdom (Toronto: Clarke Irwin, 1978) contains a foreword by Professor Abraham Rotstein, University of Toronto, and is obviously addressed to the scholarly community as well as the informed public. (Elsewhere, in The Guide, April, 1977, Rotstein refers affectionately to the CLAC as "the Dutch mafia", and "a sprinkling of yeast in the Canadian body politic".)

Among the issues dealt with in CLAC publications during its first twenty-nine years have been collective bargaining, industrial conflict, labour legislation, government fiscal policies, freedom to work, unemployment, computerization, shopfloor problems, worker participation in management, human rights, a new industrial order and a new social order. In dealing with any of these issues, the CLAC's spokesmen remind their readers that "a biblical view of human tasks and human responsibility with respect to social cooperation and participation is a prerequisite for a harmonious socioeconomic revival of a broken world". (Peter Nijkamp, "Societal Aspects of Labour", in Paul Marshall, et al., Labour of Love: Essays on Work, 1980.)

The following statements by CLAC writers best express the basic positions taken by the Association on labour-related problems:

1. Christian workers wishing to take seriously the Word of their Lord . . . cannot accept the prevailing secular attitude towards work and labour unions. They cannot endorse the notion that a labour union can be religiously neutral, for they know that they are to live before the face of their Maker at all times.

   Those who accept the all-embracing authority of Christ must not, may not, be forced to conform to the patterns of a secular labour union. By the same token, those who reject the claims of the Scriptures must be free to order their daily lives and to form a labour union in conformity with their own conviction.

   (Harry Antonides, The Freedom to Work, 1967. p. 27)

2. Collective bargaining in Canada is predicated on the concept that labour-management is an adversary relationship. Labour and management are considered to be fighting for their own competing interests. Thus the enterprise is seen as a battle ground for those interests and collective bargaining is then reduced to a sheer power struggle. But when human relations are reduced to a power relationship, the spoil goes to the strongest and justice is trampled under foot.

   The enterprise must be seen as a work community in which managers, capital suppliers and workers cooperate in supplying needed goods and services. For this reason workers should be integrated as full-fledged participants in the enterprise. This can be accomplished by workers taking their place on the board of directors. Furthermore, moves to "open up" the work situations must be supported with the aim of making work itself more meaningful and rewarding. That this will require drastic changes on the part of management and unions alike is obvious. Right now we should begin to think about preparing workers for a much enlarged role within the enterprise.

   Collective bargaining must be conducted with a view towards the needs of all groups in society within the boundaries of a wholesome and balanced development of our economy. This objective requires that the problem of a more equitable distribution of income be tackled in a systematic way. This underscores the need to replace the adversary approach, because a more equitable distribution will not result from a power struggle but only from a new approach based on justice.

   (Harry Antonides, "Beyond the Adversary System", in Ed Vanderkloet et al. Beyond the Adversary System: Essays on Industrial Relations, CLAC, 1976. 30p.)

One of the best examples of how CLAC publications are used to educate

Association members and strengthen them in their resolve is provided by The Guide's editor, Ed Vanderkloet:

> Our message to the world must always, either explicitly or implicitly, be a call to return to the service of the Lord of all creation, who one day will ask us to give an account of what we have done with his world.
> (The Guide, Aug.--Sept., 1981)

Is it any wonder, then, that the larger, more militant and materialistic labour unions in Canada have attempted to keep this "strange group" from adding to its numbers?

Media Evaluation: Report from a Consultant in the Development and Use of Distance Education Programs and Learning Resources

The Education Program developed and used by the British Columbia Hospital Employees Union (H.E.U.) was submitted to an independent consultant with expertise in the development and use of distance education programs and learning resources. The materials consist of about 600 pages housed in a three-ring binder (2 1/2") covering the following sections:

1. Role of Officers and Stewards
2. Contract Analysis
3. Legislative Provisions
4. Public Speaking and Parliamentary Procedures
5. Trade Union History
6. Miscellaneous

General Comments

The opening section of the manual leads me to think that the materials provided in the binder are: (a) summary lecture notes provided for the purpose of reducing note-taking by participants and enlarged on by the lecturer or resource person, and (b) additional information relevant to take-home assignments which are done between group sessions. One difficulty I experienced was that this is clearly not a manual for instructors and does not provide overall instructions about use of materials, about the order of sessions and assignments, and so on. The manual would only work if accompanied by specific instructions given by the resource person(s) directly to the participants, instructions which do not necessarily appear in the manual itself. I question what would happen to a large amount of very good materials if the major planner, lecturer, or resource person(s) involved in the design of the manual were unavailable.

In general, without specific instructions, I found the distance learning materials and assignments were unclear and thought they might prove troublesome for learners who were doing the work in relative isolation. For example:

- there appears to be no (or little) information which would assist the distance learner to obtain additional learning resources or to up-date material as time passes;

- there is no clear indication of where or how the exercises fit into the design of the programs or the content;

- there is no overall summary of the contents of the manual to give the individual learner a "bird's eye view" of the structure, content, progression, and processes involved;

- the pages are unnumbered and there is no index or table of contents for the entire manual nor for individual sections.

Specific Comments

1. The section on the "Role of the Steward" is a very good summary for both speaker and learner. I assume that the materials provided in the Miscellaneous Section provide some support materials for the learning activities of this section. There is apparently total dependence on this manual for information unless there are additional notes or reading lists which have not been included in the manual I reviewed.

2. The sections on "Contract Analysis" and "Legislative Provisions" are clearly very useful for reference purposes. Sturdy index tabs--or even putting individual sections into separate binders--would make the manual physically easier to use, particularly if each section is to become a reference section for later use. Separate folders or binders would make later up-dating easier to accomplish as well.

3. The section on "Communication" is full of useful information and tips, usually clearly explained and presented. I would judge the reading level to be about Grade 10 but would suggest that the planner have the materials in this section--and all other sections--rated for readability levels using some standard literacy measure.

   Actual examples of agenda papers, minutes, and so on would have enhanced this section.

   The "Summary of Motions" blows me away. This is complex material. I hope that the quality of the content of the discussions which emerges is as high as the quality of the process envisaged by the materials provided. This summary could provide the base for a series of actual learning activities but nothing tells me that this is how this section is to be used. Perhaps it is for reference purposes only, in which case I would have been inclined to present the materials from a problem or situational perspective.

4. The bits and pieces on grievances provided under "Miscellaneous" seem like orphans. I would have preferred to see them listed as appendices under the relevant sections.

5. The material cannot stand alone as an individual learning package, for any form of non-classroom learning. My guess is that Ray McCready's energy and personality, and his close involvement with the content and design to the package carry it through every session. He must do a lot of facilitating and teaching which does not show up in the package itself.

6. To convert this package into a good quality distance learning package would take introductory organizational materials, foundation building devices, very clearly sequenced instructions about learning tasks as these relate to both general and specific learning goals.

7. The resource materials do not, on their own, encourage much interaction among learners nor provoke the student to identify his/her own situation and then do some discovery learning. It reads as a "one-way-out" set of materials. Since Ray McCready provides the interaction, provokes situational thinking and problem-solving and carries out the teaching as a two-way process, therefore the materials would provide good support information.

8. I cannot determine from the manual, if students are expected to take this information back to their locals and do some informal teaching among rank-and-file members. If so, how they might manage such a process is unclear.

9. The manual could be converted into a very solid distance learning package which might become useful to other unions as well. The good stuff should not be buried within one union and might be shared among other small unions, particularly those in British Columbia.

A Content Evaluation of Three Shop Steward Manuals

Our contact with education officers and those responsible for the administration of LEP funds within both the contract and grants sections of the LEP indicated that concern for the shop steward was one of the primary focuses of much effort over all four year of the LEP under review. A review of materials produced and purchased by LEP funds also indicated that a large amount of money was directed towards basic shop steward training. Accordingly, we selected three manuals which were produced for the express intent of assisting those elected to the shop steward's role: a Handbook for Stewards, produced by the Christian Labour Association of Canada; a Manual for Stewards, produced by the Canadian Labour Congress; and a booklet which accompanied seminars for Shop Stewards designed by the Canadian Conference of Teamsters (Western Region).

The first two are relatively small publicaions (50 and 62 pages respectively) in a compact 4 X 6.5" format; the latter is a 76 page booklet in an 8.5 X 11" format.

The three documents were reviewed by a former union organizer who has held the position of shop steward, is now a professional writer/producer of educational media, and continues to work with unions and associations on labour education issues. It is noteworthy that each of the three associations has chosen a different approach to informing the shop steward about what it regards as the critical issues which will confront him or her. The CLAC manual focuses on the initial phases of the grievance/arbitration procedure and encourages the steward to be an industrial peacemaker. The CLC document focuses on grievances and on the personal skills required of the shop steward in the presentation and argument of a case. The Teamsters' material concentrates on grievances arising out of firings and contains little on the personal qualities necessary for the optimum performance of the steward's role.

In a sense it is an "apples and oranges" comparison when one places the three documents side by side. The Teamsters' approach clearly provides materials which can back up a seminar providing other skills in addition to those detailed in print. The CLC clearly attempts to present the shop steward as a pivotal person in the work place ("You are the union to the majority of your members and it is your job to build the union day by day."). The CLAC presents the steward in a potentially conflict-laden positon ("The steward plays a vital role in maintaining communication between workers and management on the one hand and between the union and its membership on the other hand."). Despite these different orientations and intentions the three documents each exhibits a different set of strengths and weaknesses as detailed in the accompanying material. Our overall assessment is that the Teamsters' manual is probably a better example of a training manual than is either of the other two. On the other hand, the CLC manual gives the personal qualities necessary for the efficient functioning as a steward the same amount of importance as the sets of procedures and documents required for handling the ubiquitous grievances. The CLAC handbook is very sparse in detail but espouses a philosophy of responsibility and of "situational (union) ethics" which might, in practice, offer some support for the steward confronted with industrial disputes, but which might fail to indicate precisely what ought to be done from a legal and contractual point of view for the maximum protection of the union member whom he or she serves.

The report of the independent consultant follows:

Foreword

Each manual can only be judged by the extent to which it fulfills the task it sets out to do. For this reason it has been difficult to do a "comparison of the extent of the steward's role, etc." as defined in these three books since the Teamsters' document concerns itself only with the steward's role in settling grievances. (I assume the Teamsters have steward handbooks like that of the CLC.)

Furthermore, it appears that the CLAC does not have locally elected executives; the stewards and staff representative together carry out responsibilities that would normally be taken on by an executive. The CLAC handbook consequently goes into a few things (like the Labour-Management Relations Committee) that most unions would not include in a steward's handbook.

Finally, since the Teamsters' book is larger--not the handy pocket size of a steward's handbook--and since it is devoted entirely to the handling of grievances, it obviously covers the grievance procedure in much more detail than the other two documents which were designed for quite a different purpose.

With these limitations in mind, I have constructed a CONTENT COMPARISON TABLE which might be of some help in assessing what each manual touches on. Since this table gives no indication of the extent and quality of the items listed, and since space does not permit a comment on all, a few sample items were chosen and evaluated. Comparisons are also made between the CLC and CLAC documents. The Teamsters' is assessed separately for reasons stated above.

Finally, all three documents are briefly compared according to general adequacy, clarity and production values.

Table 5-1

CONTENT COMPARISON TABLE

STEWARDS - GENERAL

CONTENT	CLC	CLAC	TEAMSTERS
a) Information about union (history, dues	X		
b) Union vs non-union shop	X		X
c) Personal qualities of a steward	X	X	X
d) Need to know work-place well	X	X	
e) Overview of steward's responsibilities	X	X	
f) Union resources available	X	X	X
g) Non-union resources available	X		
h) Steward's Kit (collective agreement, etc.)	X		
i) Steward's meetings	X	X	
j) Departmental (shop) meetings		X	
k) Union membership meetings	X	X	
l) Time off for union duties		X	
m) References to related literature			X
n) Glossary of union terms	X		
o) Directory of union offices	X		
p) Steward's personal directory	X	X	
q) Steward's creed	X		

Table 5-2

CONTENT COMPARISON TABLE

STEWARDS - GRIEVANCES

CONTENT	CLC	CLAC	TEAMSTERS
a) Reason for grievance procedure	X	X	X
b) Importance of collective agreement	X	X	X
c) Reasons for encouraging grievances		X	
d) Role of stewards in grievance procedure	X	X	X
e) Types of grievances (group, policy etc.)		X	X
f) Distinguishing between complaints and grievances	X		X
g) Examples of grievable offenses	X		X
h) Instances where employee has right to disobey orders from supervisor			X
i) Investigating a grievance	X	X	X
j) Writing an official grievance	X	X	X
k) Importance of time limitations	X	X	X
l) Conducting meetings with supervisor and/or grievor	X	X	X
m) Detailed examination of arguments used in typical grievances			X
n) Grievances arising out of wrongful dismissal			X
o) Detailed illustrations of how to research a grievance			X
p) Use of texts of past arbitration awards when processing grievance	X		X
q) Union resources available	X	X	X

Elaboration of Content Comparison Table for CLC and CLAC Documents Only

Both documents are intended to be a steward's handbook which the steward can easily carry around, and hence, have a wide variety of important information at hand. As such, both documents touch on many issues briefly. The CLC, however, deals with many more issues than the CLAC and on the whole gets much more information into about the same number of pages. On the whole I find the CLC booklet far superior to that of the CLAC. It is far more comprehensive and much easier to read. The CLAC has many useful sections but tends to be selective in the information it presents and is often repetitive.

Stewards--General: Items (a)--(b), (Table 4-1)

The CLC's history of the Congress is very useful as is its description of the Congress's internal structure. The CLAC is very weak on this throughout the book. By the time I had finished the manual I knew very little about the organizaion and so, presumably, would a new steward.

(c)--(h), (Table 4-1)

Both manuals discuss qualities which are desirable in a steward. The CLC lists them in a separate section; the CLAC refers to these qualities as it touches on other issues.

The CLC gives a comprehensive list of most duties a steward might be expected to perform. The steward's kit on p. 16 deserves special mention as it is an example of the very practical nature of the document--certainly one of its strengths.

The CLAC lists fewer duties but discusses them in greater detail than does the CLC. The paragraphs on getting to know new members and signing them up in the union is one of the CLAC's stronger sections.

It should be noted that the thrust of the CLAC document is to encourage the steward to be an industrial peacemaker. Consequently, those actions which would lead to greater cooperation with management are emphasized, and those which might lead to greater militancy are either left out or skipped over. For example, discussed in some detail are the need to prevent wild-cat strikes, the need to be understanding of management, the steward's role on the labour-management committee and so on.

At times the document becomes quite unusual for a union publication when this line of argument is carried. With respect to strikes by other unions, the steward is told he (sic) cannot "arbitrarily honour every picket line you come across" (p. 19). He can talk to pickets of other unions on strike but then he should "find out what you can from the pickets, and inform both your employer and your CLAC representative" (p. 20). He is encouraged not to give the union confidential information provided him by his employer and so on. It is very difficult to separate criticism of the document from criticism of the union itself, but certainly the major weakness of the document from the point view of a trade unionist is its encouragement of cooperation with management at the expense of union solidarity. This will be mentioned again below under "Tone".

(i)--(l), (Table 4-1)

In my view both booklets are weak in the area of meetings organized or attended by the steward. The CLC includes in its list of steward duties the need to attend membership meetings and inform members in the shop. The CLAC goes further--and is stronger than the CLC in this area--in that it gives greater emphasis to departmental and steward meetings.

Nevertheless, many unions today see the steward as the person who is best able to involve the membership in union activities and I would like to have seen a section in each book on how this can be done. For example, stewards can help to arrange car pools, and they can inform the executive if meetings are being held at times which make it difficult for the members of their shop to attend. No mention is made in the books of making a special effort on behalf of women and minorities. For example, members can be found who can help translate at union meetings for those who do not speak English; the executive or department can be asked to help defray baby-sitting costs, etc.

Nor is any help given in either book on how the steward can call and chair a meeting for his or her shop; nor on how to conduct a meeting. The CLAC makes no mention of learning any rules of order in order to participate at union meetings; the CLC makes a brief reference to the union's constitution and by-laws.

The CLAC document is weak in many areas. The CLC book, however, is generally excellent except in the area of membership, shop and steward meetings.

(m)--(q), (Table 4-1)

As can be seen from the chart the CLC is very strong in this area. The CLAC remains to the end shrouded in mystery.

Comparison of the CLC and CLAC Documents with Respect to Their Treatment of Grievances

Processing grievances is seen by both manuals as one of the most important duties of the steward. The CLC begins with a list of issues which could lead to grievances, then lays out the grievance procedure step by step: how to investigate a complaint and determine if it is a violation of the collective agreement; how to write up a grievance; how to argue it before management, and what happens when it goes to arbitration. The CLC document makes no reference to the different types of grievances--individual, group, policy or union.

The CLAC divides the grievance procedure into two steps. Step one involves writing out the grievance and discussing it with the supervisor. Step two talks about what happens to the grievance if it is not resolved at the supervisory level.

It is the steward's responsibility to process step one of the grievance. From there s/he must pass it on to the Staff Representative who will decide if there's any point in taking it any further. Because of this division of responsibility, the CLAC document discusses step one in some detail and then very briefly describes the arbitration process. Furthermore, unlike the CLC booklet, the CLAC does discuss policy, group and union grievances. It also expresses the need for a steward to submit a grievance if there has been a violation of the collective agreement, whether the employee effected wants to grieve or not. Neither booklet, however, makes mention of a problem that comes up frequently and that is a request by an employee to grieve against another employee. It is often one that causes a steward endless frustration. The section of the CLAC document that deals with the grievance procedure, and which takes up the last quarter of the book, is by far its strongest section.

Nevertheless, the CLAC does have a serious weakness within this section. It is very confused over what a grievance actually is. For example, on p. 34 the steward must consider the question, "Does the grievance violate the collective agreement?" before determining if, in fact, the complaint can be grieved. On p. 36, however, it states that "In most cases a just grievance will constitute a violation of the collective agreement." (my emphasis).

There is no explanation as to what a "just" grievance could be if it didn't violate the agreement. There are also confusing references to "complaint", "unjust grievance" and "real grievance".

Summary and Evaluation of the Teamsters' Manual

As was stated above, the Teamsters' document is not a steward's handbook; it is a comprehensive and detailed manual on handling grievances, with special emphasis on grievances arising out of firings. The Teamsters say they are providing the book so that stewards might be armed with the same kind of ammunition as lawyers and staff representatives, in the hopes that grievances can be settled faster and more cheaply earlier in the process.

This goal is admirable. Staff representatives in most unions are snowed under in grievances that probably could have been settled earlier by the steward. The manual itself is superb. It is difficult to imagine any aspect of grievances that is not dealt by it. It is easy and interesting to read and amply illustrated.

The first section describes the grievance procedure and takes the steward through it, step by step. In this respect it is somewhat like the CLC's section on grievances.

The second part of the book is concerned solely with fighting grievances over firings. In a sense the second part is an illustration of what was discussed in the first. Firings are chosen because of the seriousness of the penalty. In arguing the case, the steward is provided with the kinds of arguments which have successfully and unsuccessfuly been used in past arbitrations. Generously sprinkled throughout all of these arguments are illustrations from actual past grievances, many of them humorous.

The last half of the book, entitled "Research" is a description of the Teamsters' Research Department, how information related to grievances is organized in it, and how it can be used by stewards. This is illustrated by taking the steward through research that could be of use in the case of firings caused by insubordination, carelessness and a poor work record. In each instance relevant arbitration cases are examined to discover which arguments might be of use to the steward and which ones he/she might expect from management.

Most union headquarters are filled with valuable information the rank and file rarely see, so if the Teamsters are trying to reach out and make theirs' more accessible to their members, then hurrah for them. In my view this book more than adequately fulfills the goal it sets for itself.

Comparison of the CLC, CLAC and Teamsters Documents--Production Adequacy

The Teamsters' manual is more than adequate. There can be little about the processing of grievances that isn't in there. The CLC handbook is also excellent. In my view it does not deal enough with the steward's role in encouraging participation in union activities, especially for minorities, but this was noted above. Otherwise it is comprehensive and packed full of valuable information--certainly as much as can be contained to still retain its handy size. The CLAC handbook is difficult to evaluate. It discusses fewer issues than the CLC, but one gains the impression the steward plays a more limited role in this union as much is left for the service representative.

Format--Language--Tone

Both the CLC and Teamsters' documents are very well organized, clear and easy to read. The CLC lists a detailed index at the beginning and follows it step by step, point by point. The paragraphs are small, the headings are clear, and point form and lists are used where appropriate. In the 60 pages there are about 14 graphs or cartoons. I would suspect the language would be understood by anyone with about grade ten education. Also noteworthy is the degree to which the CLC's is a completely non-sexist publication. I don't think the word "he", "him", etc. is used once in the book. The little cartoons illustrate both men and women involved in the grievance procedure. The tone of the book is positive. It espouses trade union principles but is not antagonistic toward management.

The Teamsters' document is organized in much the same way as the CLC's. It is clear and easy to read although I would say that the readership of the Teamsters would have to be more skilled in reading than those of the CLC. The education level of the Teamsters' readership would be something like high school graduation. The layout of the Teamsters' book is not as good as that of the CLC in that there is no variation in the size or weight of the type. Nor are there any charts or illustrations. The language is sexist--all references are to men although many Teamsters are women--but otherwise it is positive in tone in that it is frank and often humorous. Management is viewed as a worthy and challenging opponent.

The CLAC document is not well organized, although it is certainly easy to read. The same points are often repeated several times throughout the book, and in the first part at least, there seems to be little logic as to why a certain issue is suddenly dropped in. The tone of the book is reminiscent of the Canadian and Catholic Confederation of Labour publications in Quebec in the forties. It is patronizing and often seems to be more sympathetic to management than it is to the members of other unions. Unlike the Teamsters' and CLC's publications there are no references to other resources and no directory at the back. It is better than having nothing at all, but in comparison to the other two documents, it looks amateurish.

TABLE 5-3

CANADIAN LABOUR CONGRESS
Labour Education and Studies Centre

MEDIA

A. Print Materials

BASIC INSTRUCTOR TRAINING

Student's Handbook	Cost	$ 9.00
Instructor's Handbook		15.00

Begun 1977-78; revised and published 1979-80
- reviewed in Preliminary Report (1980)

BASIC LEADERSHIP SKILLS
Began as Student's Workbook and Instructor's Handbook, 1977-78
Now available as three-part video production.

SOCIO-ECONOMIC PLANNING
Student's Workbook and Instructor's Handbook.
Begun 1977-78; revised 1978-79; published 1980-81
Not listed for sale.

ARBITRATION COURSE

Student's Workbook	Cost	$10.00
Instructor's Handbook		37.00

Begun 1978-79; published 1980-81
- reviewed in Chapter Five

WOMEN'S BUREAU INFORMATION KIT
Published 1978-79; 2nd edition 1980-81.

LABOUR RELATIONS: AN OVERVIEW
Manual for course in Labour Journalism.
Begun in 1978-79
No further information

CORPORATE FINANCE: THE STRUCTURE, FINANCE AND OPERATION OF INDUSTRY
Basic Manual 1978-79; revised 1979-80
Supplements for:
- Forestry Products Industry (1979-80)
- Electric and Electronics Industry (1979-80)
- Food and Beverage Industry (1980-81)
- Clothing and Textile Industry (1981-82)

None of these items listed for sale.

STAFF RESOURCE MANUAL Cost $15.00
Economic and Financial Analysis for Unions
Begun 1978-79; published 1980-81
Used for training local administrators
- reviewed in Preliminary Report (1980)

TABLE 5-3 (continued)

A. Print Materials (continued)

STEWARD TRAINING	
Student Workbook	Cost $12.50
Instructor's Manual	40.50
Begun 1978-79; published 1980-81	
ART/LABOUR POSTERS	
Set of six	Cost $12.00
Published 1979-80	
BARGAINING BASICS SERIES	
Preparing to Negotiate	Cost $ .75
Negotiating Pensions	.75
Published 1980-81	
More in series to come.	
ISSUES IN OCCUPATIONAL HEALTH AND SAFETY	
Clerical and Officer Hazards: An Inventory	
Cancer in the Workplace	
Published 1981-82	
WOMEN'S ISSUES	
Equal Partners for Change	
Affirmative Action	
Bargaining Equality Issues	
Introduction to Equality of Opportunity	
Published 1981-82	
COLLECTIVE BARGAINING	
Student's Manual	
Instructor's Manual	
Published 1980-81	
Not listed for sale. - reviewed in Chapter Five	
AN ILLUSTRATED HISTORY OF CANADIAN LABOUR 1900-1974	
by Edward E. Seymour	Cost $ 3.00

New materials begun in 1981-82:

Labour Law
Trade Union Economics
Pre-retirement Training
Union Counselling
Labour and the Media

TABLE 5-3 (continued)

B. Videotaped Material

AN INTERVIEW WITH BARRY COMMONER
Produced in cooperation with Public Relations
1977-78

JOBS, ENERGY AND THE ENVIRONMENT
Speech by Dr. Barry Commoner with Question and Answer Period
Produced in cooperation with Public Relations
1977-78

PERSPECTIVES IN CANADIAN LABOUR (Historical Series)
Produced for the LESC during 1977-79
Interviews range from 16 to 34 minutes
Interviews with: Lincoln Bishop
Bob Carlin
Shirley Carr
William Dodge
Claude Edwards
Bert Hepworth
Kalmen Kaplansky
Stanley Knowles
Donald MacDonald
Joe MacKenzie
Dennis McDermott
Julien Major
Don Montgomery
Joe Morris
Don Secord
Eileen Sufrin
Jack Williams

* OPERATION SOLIDARITY
Review of conditions in Nicarauga
Produced in cooperation with Political Education
1978-79

* INTERVIEW WITH CESAR CHAVEZ
Review of National Boycott on Iceberg Lettuce
Produced in cooperation with Public Relations
1978-79

* NEWFOUNDLAND FISHERMEN, FOOD AND ALLIED WORKERS
Produced in cooperation with NFFAW
1978-79

* UNIONS AND THE FISHERMEN
Review of support for Maritime Fishermen's Union
Produced in cooperation with the MFU
1978-79

* Reviewed in Preliminary Report (1980)

TABLE 5-3 (continued)

B. Videotaped Materials (continued)

LABOUR DAY MESSAGE
Speech by CLC President Dennis McDermott
Produced in cooperation with Public Relations
1978-79

BRAC MEDICARE PROGRAM and BRAC CONVENTION HIGHLIGHTS (1980)
Produced in cooperation with the Brotherhood of Railway Airline and Steamship Clerks
1978-79 and 1879-80

** THE ART OF CROSS-EXAMINATION
Produced for the LESC for use in the Arbitration Course
Two more programs in series to be produced
Also available as 16 mm film
1979-80

S.O.S. MEDICARE CONFERENCE
Produced in cooperation with Social and Community Affairs
Five tapes edited:
- Medicare: The Political View
- The Fathers of Medicare
- Medicare: Crisis and Opportunity
- Keynote Address by Dennis McDermott
- Conference Highlights

Also available on audiotape
1979-80

LABOUR FORUM SERIES
Produced in cooperation with the Sudbury Labour Council
- Opening and Closing Programs
- Interview with Larry Wagg
- Interview with John Harker
- Interview with Dennis McDermott
- Interview with Jean Bezusky

1979-80

INTERNATIONAL AFFAIRS SERIES
Produced in cooperation with Political Education

Interview with David Wogute	1978-79
Interview with Carl Wright	1979-80
Interview with Alam Amey	1979-80
Interview with Dan Gallin	1980-81
Interview with Andrew Kailembo	1980-81

LEADERSHIP SKILLS SERIES
Produced from the LESC for use in the Leadership Skills Course
Two more programs in series to be produced
Also available as 16 mm films

Business as Usual	1979-80
The Show Must Go On	1979-80
Straight Talk	1980-81

** Reviewed in Chapter

B. Videotaped Materials (continued)

UNIONS ARE PEOPLE
Produced in cooperation with Public Relations
1979-80

HANSARD, OCTOBER 30, 1979
Produced in cooperation with Political Education
Debate in House of Commons on Bill C-217, An Act to Amend the Statute Law relating to income tax and to amend the Canada Pension Plan.
1979-80

WHY? THE PERFECT UNION: Me and the NDP
Produced in cooperation with Political Education
1979-80

1980 CLC CONVENTION
Produced in cooperation with Public Relations
Four tapes edited, also available as audtiotapes
- Resolution on Sexual Harassment
- Health and Safety Debate
- Tribute to Tommy Douglas
- Tribute to David Lewis

1979-80

LIBERALISM, MARXISM AND SOCIALISM
Produced in cooperation with the Ontario Federation of Labour
1979-80

ACCOUNT OVERDUE
Produced in cooperation with the Bank Workers Organizing Committee
Also available as 16 mm film
1979-80

WHY? OUR UNION and LABOUR LEGISLATION
Produced in cooperation with the National Union of Provincial Government Employees (NUPGE)
1979-80

CHOICES and TAKE IT OR LEAVE IT
Produced for the LESC on Employee Recovery
Also available as 16 mm films
1980-81

SUSPENSION OF THE BUILDING TRADES
Produced in cooperation with Political Education
1980-81

CUTBACKS AND CONTRACTING OUT
Produced in cooperation with CUPE
Four-part program
1980-81

UAW NEW MEMBER ORIENTATION
Produced in cooperation with the United Auto Workers, Local 222
1980-81

LABOUR LAW
Produced for the LESC Labour Law course
In progress

TABLE 5-3 (continued)

C. Other Visual Materials

** THE STEWARD
Produced for the LESC to accompany the Manual for Stewards
35 mm slides
1977-78

* PEOPLE AND JOBS
Produced in cooperation with Public Relations for the 1978 CLC Convention and Campaign on Full Employment
Also on videotape
1978-79

** THE RIGHT TO SURVIVE
Produced for the LESC on Health and Safety issues
35 mm slides
1978-79

INSTRUCTOR TRAINING
Produced for the LESC as overhead transparencies for use with the Instructor Training Manual
1978-79

DUKE OF EDINBURGH COMMONWEALTH STUDY CONFERENCE
Produced in cooperation with Public Relations
35 mm slides with audiocassette
1979-80

EQUAL PAY, EQUAL PARTNERS
Produced in cooperation with Social and Community Services
35 mm slides plus audiocassette
1979-80

SURVIVAL IN THE PUBLIC SECTOR
Produced in cooperation with labour organizations in the public sector--NUPGE, CUPE and PSAC
1980-81

D. Audiotaped Materials

THE WORKPLACE SERIES
Produced in cooperation with Social and Community Affairs
16 titles in series
1979-80

SHIRLEY CARR'S ADDRESS TO CALM CONVENTION
Produced in cooperation with Social and Community Affairs
1979-80

INTERVIEW WITH TOMMY DOUGLAS
Produced for the LESC as part of the Historical Series
1979-80

INTERVIEW WITH DAVID LEWIS
Produced for the LESC as part of the Historical Series
1979-80

** Reviewed in Chapter Five

* Reviewed in Preliminary Report (1980)

CHAPTER SIX

International Comparisons

Introduction

The project directors both spent time interviewing labour educators from other countries. The following section offers a broad review of salient factors in the labour education programs currently available in the United Kingdom, Germany, Denmark, Sweden, France, and Australia. The reviews are brief and the comparisons are left to the reader, rather than being made explicit by the writers. A list of persons interviewed and a bibliographic list of reference materials are provided at the end of this section.

Section 1: The Funding of Labour Education

In 1976, a report to the Canadian Labour Congress on the feasibility of establishing a Labour Education and Studies Centre for Canada described in detail many of the funding provisions which then existed to publicly support labour education in countries such as France, Germany, the United Kingdom and Italy. In many respects the situation has remained unchanged over the intervening years. However, the entire issue has become much more complicated by the introduction of regulations and legislation related to recurrent education (in France) and paid educational leave, and by the increasing use of educational benefits as one issue in the collective agreements negotiated on behalf of workers.

Personal interviews conducted in France and the United Kingdom indicate that, despite recent changes of government which might be viewed as indicating movement away from pro-labour policies, there has been no decrease in the amounts of public funds allocated for labour education. In particular, there has been no decrease in the subventions given in France to the Labour Studies Institutes and in the funds provided in the United Kingdom to the Trades Union Congress for its educational programs.

Two approaches to the funding of labour education are described in this section. In each case, the analysis is incomplete, but each will serve to highlight different mechanisms which are in place and supporting a broad spectrum of both basic and further training for workers.

1.1 Germany

Laws relevant to the provision of funds for labour education vary according to individual states or Lande. In eight Lande, there are laws which ensure adult and further training for workers. While this training is most often vocational, it may also be non-vocational in nature and sometimes focuses on "political" training. It is within this latter category that trade unionists may receive training to improve their competence in carrying out their responsibilities as members of labour organizations. The laws provide for release-time and for education in official government-supported schools, or in other educational settings such as those provided by churches, chambers of commerce, or the trade unions themselves. Employers are obliged to pay a fixed percentge (75%) of the costs of such training.

In five Lande, there are laws for education in broad non-professional training categories which we would term personal enrichment. Each employee is entitled to five days per year on full salary (or 10 days in two years) for training which can be taken in any agency selected by the employee.

While the further education of union members is guaranteed by the existence of these laws, the actual funds available for subsidies tend to be variable and linked with the economic condition prevailing from year to year. It should be noted that, in Germany, courses offered by the union are available to both union and non-union workers. Furthermore, both the employer and other community groups, such as the local people's high schools, have the right to claim funds for offering exactly the same courses as those provided by the union. In such cases, 50% of the costs may be borne by public funds. Since there is a legal right to educational leave of absence, there is competition among the three major providers of courses--the unions, the employers, and the community agencies. The availability of alternatives has led individuals to cross the floor to sample the offerings of the other side. Our interviews suggest that, in general, competition has led to better specification of objectives for courses and clearer definitions of the ideological perspective of the sponsors of a course.

1.2 United Kingdom

There is no simple way to summarize the input of public funds to labour education within the UK. Some indication of the complexities can be obtained from a statement in the annual prospectus of Northern College, a residential college offering one- and two-year courses of full-time study in topics related to trade unionism:

> The college was founded by the local education authorities in South Yorkshire, Barnsley, Doncaster, Rotherdam and Sheffield, who formed a company limited by guarantee, with the support of the Department of Education and Science, of authorities in neighbouring counties and other educational bodies in the region. These include Liverpool Education Committee, South Yorkshire County Council, Leeds, Nottingham, Bradford and Humberside Education Authorities, the Workers' Educational Association in Yorkshire, the University Extramural Departments in Yorkshire, Sheffield City Polytechnic, the TUC Yorkshire Regional Education Committee and a number of individual unions and other organisations.

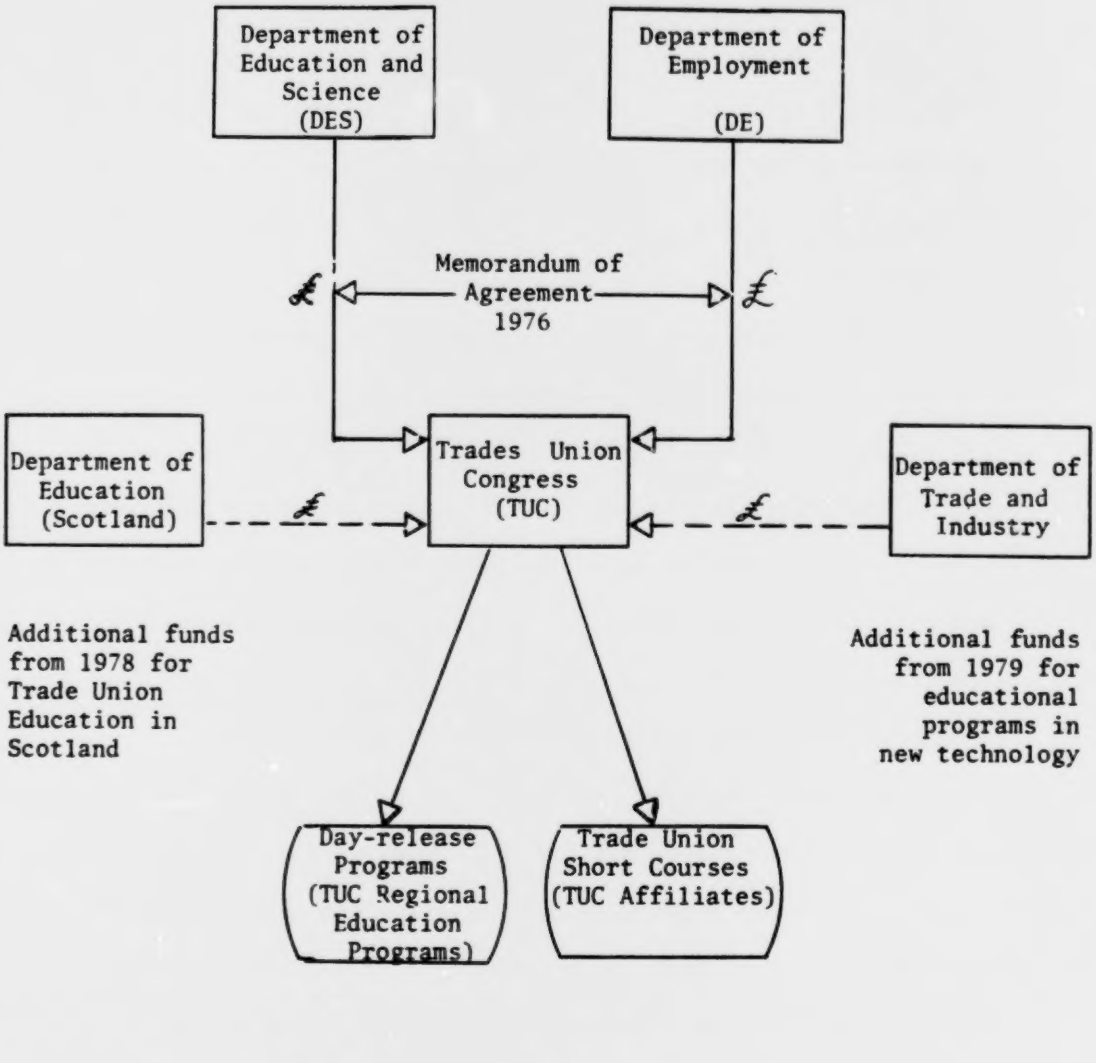
In the accompanying figures (Figures 6-a, 6-b and 6-c), we have attempted to diagram the principal expenditures of public funds, as these relate to the Trades Union Congress (TUC) and the Workers Educational Association (WEA).

Figure 6-a indicates that the funds provided to the TUC by the DES/DE are specifically for the day release programs (10 days per year) for shop stewards and safety representatives and for trade union short courses (15 hours or more) run by unions affiliated with the TUC. In the trade union short courses, affiliates may claim for tuitional costs, overhead and support materials, but not for lost wages which are covered under day release provisions and collective agreements.

The TUC maintains a tutorial (instructional) function, a curriculum development unit, and administers its own regional educational program throughout the UK. However, the majority of TUC courses are actually offered through organizations such as the WEA and through Polytechnic Institutes and Colleges of Further Education. This arrangement offers a potential source of confusion and administrative vexation. The DES/DE funds must be accounted for separately, as shown in Figure 6-b.

FIGURE 6-a

Funding of the Trades Union Congress


Department of Education and Science (DES)
Department of Employment (DE)
£
Memorandum of Agreement 1976
£
Department of Education (Scotland)
£
Trades Union Congress (TUC)
£
Department of Trade and Industry
Additional funds from 1978 for Trade Union Education in Scotland
Additional funds from 1979 for educational programs in new technology
Day-release Programs (TUC Regional Education Programs)
Trade Union Short Courses (TUC Affiliates)

DES funds can be used to support the claims of affiliated unions for labour education, but cannot be paid to the Local Education Authorities (LEA) which house the Colleges of Further Education, the local agencies which actually offer the training. Fees for courses in the Colleges of Further Education are paid by the TUC, using funds from the DE.

The broken arrow across the top of Figure 6-b indicates that additional funds for the LEA are provided by the DES for other purposes under other legislation. The separation of DES/DE funds is understandable as a way of eliminating the appearance of double-payment for College of Further Education courses.

Finally, whereas the TUC reimburses the Colleges of Further Education on a per student basis, it operates 25% of its courses through the WEA, which it reimburses on a cost per course or block fee basis. The block fee is negotiated annually. Figure 6-c indicates the major sources of funding for the WEA. The DES also provides funds to the WEA, which cover some costs, with the TUC covering (theoretically) the balance.

The administrative arrangements among the TUC, the WEA, the Colleges of Further Education and the LEAs appear to be operational but are subject to annual rounds of negotiations related to establishing the fee per student and block fees to be paid by the TUC. It seems likely that as participation rates increase, and the providing agencies request increase in the individual and block fees, pressure will increases on the funds of the TUC and stress will enter the annual rounds of negotiation.

FIGURE 6-b

Separation of funding to the Trades Union Congress

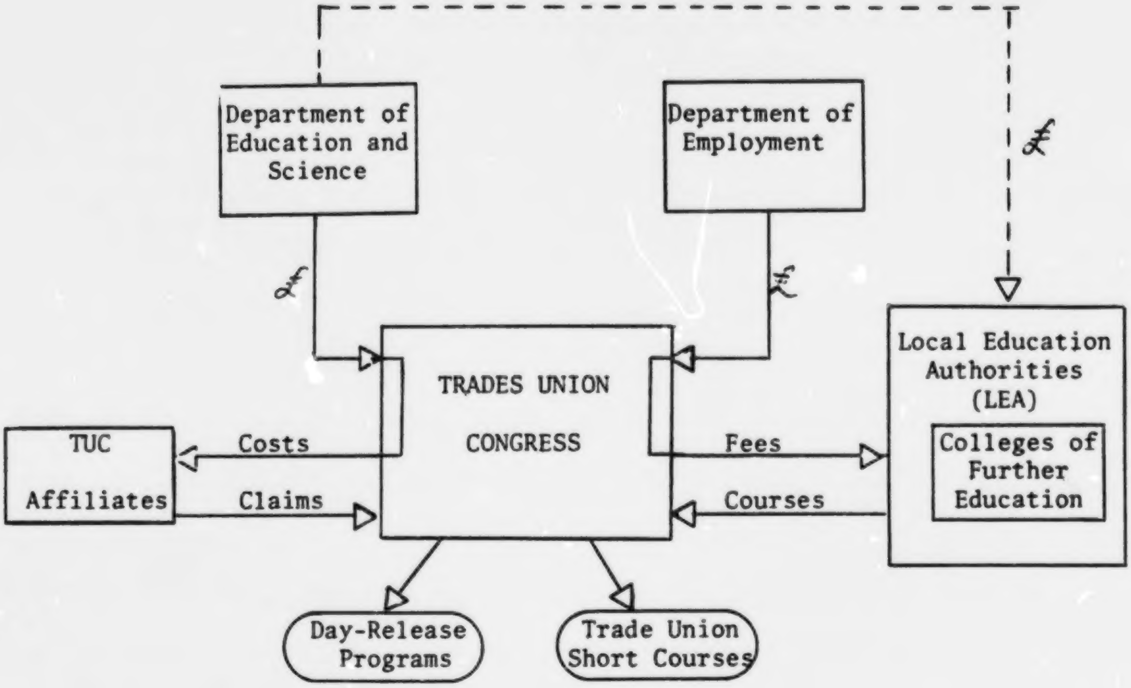
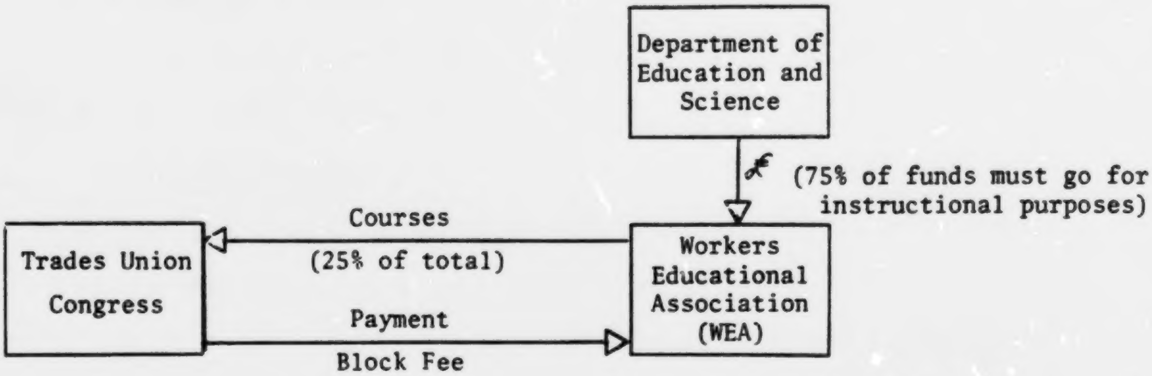

Department of Education and Science
Department of Employment
£
£
£
TRADES UNION CONGRESS
Local Education Authorities (LEA)
Colleges of Further Education
TUC Affiliates
Costs
Claims
Fees
Courses
Day-Release Programs
Trade Union Short Courses

FIGURE 6-c

Funding For Workers Educational Association


Department of Education and Science
£
(75% of funds must go for instructional purposes)
Courses
(25% of total)
Trades Union Congress
Workers Educational Association (WEA)
Payment
Block Fee

Note: In Scotland, the WEA is not a "responsible body". It, therefore, does not receive funds from the DES. A supplementary grant is given to the TUC for funding labour education courses in Scotland.

Section 2: Controls on Labour Education

The LEP in Canada has operated on the basis of a no-strings policy. The Ministry of Labour has kept a financial audit and a watching brief on the programs being offered under the contracts, grants, bursaries and contributions. In the UK, the Memorandum of Agreement (1976) between the DES/DE and the TUC specifically excludes two types of educational activity--training for officers of the trade union movement and training of a political nature. Beyond these two areas, there appear to be no restrictions. Spokesmen for the WEA indicated that through the Inspectorate of the DES, the content of WEA courses could be monitored "to ensure reasonable representation" of the subjects covered. The employer has the right to see a synopsis of the course curriculum, but has no rights concerning that curriculum, nor does the employer have the right either to be present at the course sesssions or to intervene in the conduct of the course in any way.

German legislation provides for both personal enrichment and political education for workers.

The French Institutes of Labour Studies operate within the umbrella of host universities and are theoretically free to teach any subject. Personal interviews suggest that senior personnel feel some government pressure to avoid political alignment or political indoctrination.

In Australia during the past three years, there has been increasing pressure, through a government inquiry, to restrict the offerings of the Trade Union Training Authority (TUTA) in trade union education and to exclude broad educational programs of a more general type.

The operations of the trade unions within the Scandinavian countries suggest a very close relationship with political parties. In Sweden, there are constitutional links among the Swedish counterparts of the WEA, the TUC and the Social Democratic Party of Sweden. In Denmark, we were told that a member of the Communist Party might not be allowed to take courses in the Danish WEA program.

In Denmark there has been steady development of the power of the Landsorganisation (LO) to design and implement their own courses. In the late 1940's and through to the mid 1950's funds made available for the training of shop stewards were directed towards educational programs based on a philosophy of productivity. While the unions agreed with the need for productivity, they objected strongly to the bureaucratic ways in which the Danish government approached the development of course content and materials, delivery of courses, and methods of instructor training. Eventually the LO wrested control of steward training from the central government.

More recently, safety representatives in the unions were offered the legal right to receive one week of training at the employer's expense. This time the LO found itself in a battle with employers who wanted to influence course content. The issue was resolved with the establishment of shared control in which both unions and employers have 50% control of content and material, instructor training and selection. An agreement was reached to the effect that union policies must be omitted as a formal part of the presentation of material. It is interesting to note that while the LO has been aligned with political forces within Denmark, the unions have been restrained from any form of advance of their own position in programs funded by employers.

Our impression was that, once the bargain had been struck between government and labour for the use of public funds to support labour education, most governments try to maintain an arms-length relationships vis-a-vis the content of the courses offered, with the exception of the political education of workers. We were also advised that in Germany, France and Italy, trade unionists have argued that all instruction should be taken outside of the labour movement itself, in order to avoid the issue of labour or management control, however indirect, over the content. In these countries consequently, increasing efforts have been made to place more resources in the hands of the public education system, accompanied by a guarantee that these resouces will be available for workers' education.

Section 3: Participation

3.1 Limits on Participation Rates

In every interview we conducted, we touched at some point on the question of participation rates. Regardless of the types of legislation in place or the negotiated provisions with the employers, all countries report difficulty in attracting workers into courses--even when participation is guaranteed by law. For example, the WEA reports that the number of courses offered to the TUC have fallen by as much as 30% in 1981.

In France, despite the promise of recurrent education, and in Germany, despite the provisions of the Labour Promotion Act, few workers wish to be seen as absent from their place of work, particularly under current economic conditions. In addition, there are countless cases of employers who simply refuse to grant the worker permission to attend any educational programs, whether related to labour education or not. There have been remarkably few grievances or proceedings against employers. One senior trade unionist told us that he was recommending to union representatives that they take the issue back to the negotiating table rather than taking recourse through the law. Although the issue is being negotiated, resistance by employers is matched by reluctance of employees to act.

3.2 Participation in Labour Education

The figures on participation are always of interest, but it is extremely difficult to make meaningful comparisons across different systems or different countries. In the UK, for example, we were told that since the Employees Protection Consolidation Act was signed in 1978, approximately 80,000 safety representatives have received one-week training programs, and that the remaining 20,000 safety representatives will have received this training by the end of 1982. It is unclear which union education training scheme should be credited with this training. Under the Act, this training can be offered by the TUC or an individual union which is recognized by the employer of an individual safety representative. At the moment the Curriculum Development Unit of the TUC is working on Phase 2 or follow-on courses for safety representatives who have already received basic training. Thus, participation rates for this segment of the labour movement appear to be approaching 100%.

In Sweden, the figures for 1978 indicated that about 18% of all union members (2,000,000 persons) of the Swedish Trade Union Confedderation have taken part in some form of trade union education. Twelve percent attended study circles, five percent attended short courses (2-3 days), and one percent attended centrally held residential courses lasting a week or longer.

In Denmark, the General Union of approximately 300,000 members purchased a school in 1969 for the purposes of offering their own courses. Three years later (1972), they were forced to buy a second building to provide spaces, and are currently (1982) searaching for a third location. Their rate of growth has been approximately 20% per year. We were told that about 20% of individual union members are involved in labour education in any one year, both within the General Union and within the other two major unions, for white collar workers and for metal workers.

In Australia, France, Germany, the UK and Sweden, evidence has been collected to demonstrate that participants in courses tend to come from among those workers with higher attainment levels of formal education than the average worker in the unions from which the students come. In France, data have been collected on those taking advantage of recurrent education provisions which tends to support the conclusion that those with seniority in the union are most likely to be among those who participate in labour education.

Section 4: The Instructors

There is evidence to suggest that in all the countries about which we have information, the bulk of labour education is conducted by those with union backgrounds. Unions prefer to use personnel with experience on the shop floor, while members of the business, industrial and academic communities are frequently used for specialist presentations.

In the UK, the TUC has a strong program of tutor training and the curriculum development unit has developed materials to train tutors. Regular workshops are held for the purposes of instructing new tutors throughout the country. The TUC has approximately 300 part-time tutors. Training these individuals is, therefore, a formidable instructor training task. Tutors tend to be university trained, many with post-graduate experience. The vast majority have some form of trade union experience. Among the 50 full-time tutors employed by the TUC, all have both university and trade union experience. Both full- and part-time toturs have considerable influence on the development and revision of course materials.

In Denmark, all of the staff at the workers' high school are full-time instructors. Most are former shop stewards and all have had some form of training which is specific to labour education. Approximately 45 full-time instructors are employed by the LO in Copenhagen and are available either for local short courses or for the residential schools. The LO takes the position that courses for union members should be taught by shop stewards. In addition, the LO is committed to having its instructors actively involved in the evaluation and design of curriculum materials. Instructors are required to devote one-third of their time to teaching, one-third to personal or professional development, and one-third to the development and production of curriculum material.

A recent report on trade union education in Australia notes:

> Capable training staff were not easy to find. Criteria applied in selection were trade union experience, some experience in adult teaching, and general ability to think and communicate clearly. Not all three were or are applied in each case, the result being then and now a relatively young, and various experienced staff. . . . There is no clear path of preparation for training within the labour organizations and no indication of career possibilities either within TUTA, or within related areas of trade union work or teaching in the tertiary education system. (Thomas, 1980, p. 17)

While the concern in Australia appears to be that of finding higher level positions which will allow for the continuing development of educators, the experience in the UK would suggest that the trade union movement and its demands for part-time instructors are providing an opportunity for many tertiary level instructors to find employment by moving into labour education. Within the UK, there is a cadre of itinerant part-time instructors who move about the country, instructing union members. Many Colleges of Further Education have asked the TUC for designation as a recognized centre for trade union education.

The most visible of all trade union training centres, Ruskin College, no longer appears to provide a steady supply of instructors for the labour movement. Whereas it was once true that many potential instructors moved from the shop floor to Ruskin College to Oxford or Cambridge, and then to the WEA, this route was followed by less than 10% of the current full-time instructors. Ruskin appears to have become a clearinghouse for university degrees: that is, the two year diploma given there can be used to obtain first year exemption from a three-year undergraduate degree course at most universities.

Section 5: Course Materials

The development of course materials is a very complex issue, one which deserves a separate study. There appears to have been a considerable degree of cross-fertilization between the Nordic countries and some other European locations. In some cases, illustrations, text and even the colour-coding used in portions of courses from some labour courses appear to have migrated--without credit or annotation--from one curriculum development centre to another.

The development of educational materials in the UK, Denmark, Germany and Sweden is extensive. All of the work appears to follow a system of draft-trial-redraft-use-feedback-revision-production. The Danish LO operates on the assumption that materials produced will have an effective lifespan of three years, following which the materials will need to be revised. At the time of our visit to the LO in Copenhagen, no fewer than 20 steering groups for the development of materials were meeting concurrently. Each group consisted of 17 representatives from unions using the materials and 10 representatives from the governing body of the LO.

This is clearly a labour-intensive system and finds a parallel in the Curriculum Development Unit of the TUC, where curriculum development specialists meet with instructors/tutors to revise lesson plans, tutor notes, and course-book materails.

In Germany, the curriculum materials of the I.G. Metal Union are cited as an excellent example of user-tried materials. While we were unable to obtain these materials, we did review other material produced by the Bundesinstituts fur Berufshildung and found them to be of the highest quality in terms of graphic clarity and presentation of concepts.

Despite the injunction in the Memorandum of Agreement signed with the DES/DE in 1976, the TUC has produced a workbook on the Employment Act, entitled Beat the Act. Quite simply, it is a guide to help trade unionists "build the campaign against the new legislation, and organise to defend members' rights against legal attacks" (Foreward to Beat the Act, TUC, London, 1981). While this may fall outside the legal definition of political education, it is an interesting example of the broad scope given to labour education in the use of public funds.

Both Australia and the UK have experimented with distance education courses. An extensive evaluation of the latter has been published (Turner & Count, 1981). The content of the courses in the UK experiment were directed toward industrial democracy and involved a tri-partite arrangement among the BBC, the TUC, and the WEA, as well as the extra-mural department of Sheffield University. The approach used in course development and delivery appears to have paralleled that used by the Open University in the UK. The general conclusion of the evaluators was that:

> In spite of its good intentions, . . . the Project failed to provide a solution to the problem of making educational opportunities more widely available. The innovative use of distance-learning materials, particularly television, may have a role to play in the longer term; but an essential pre-requisite of this is a commitment to time-off during working hours, for educational purposes, by government, industry and trade unions. There is also a need to develop teaching packs and increase the available supply of potential study leaders along the lines of the Swedish (study circle) model. It would then seem more reasonable for education policy makers to initiate a debate about how distance-learning materials could be used for workplace-based programmes to promote industrial democracy. (Turner & Count, 1981)

In Australia, the establishment of postal courses covering nearly 30 topics has been in operation for 20 years. Major problems appear to have been associated with upgrading course materials and, as in the UK, difficulties in providing personal contact among instructor and students. Added to those problems is the difficulty of getting affiliates to advertise the course sufficiently. Despite these problems, students appear satisfied with the course offerings even though the overall drop-out rates vary from 27% to 45%. Many individuals take the courses for general interest and personal satisfaction, rather than for any direct contribution which the content might make to their jobs or their roles as union members.

Advanced technology in the form of computer simulations for management functions has been used in Denmark. There is no other mention of any active use of computers as part of educational programming, although in every interview we held, some reference was made of the impact of the silicon chip on employment and of the need for labour education to move in the direction of considering its impact on all phases of work.

Section 6: Relationships with Post-Secondary Institutions

The 1974 International Labour Organisation (ILO) publication, The Role of Universities in Workers Education, presented a number of working papers and philosophical positions with respect to the relationships between universities and trade unions. The model reproduced in Figure 6-d, "Theoretical spectrum of university interest in/involvement in/commitment to workers' education" comes from the ILO publication and offers a helpful synopsis of various types of relationships. The picture in 1982 appears to be similar to that described in Figure 6-d.

It is clear that there are no simple statements which can be made about universities as a group, about trade unions, and about labour education. In some counties, for example Sweden, active work with universities by the LO is limited by the press of time, rather than by any reluctance of either group to become involved. In France, the seven Institues of Labour Studies flourish, often to the dismay of other institutes which are experiencing falling enrolments. In the UK, there are literally hundreds of university personnel with keen interest in the labour movement and labour studies, and between 12 and 20 of the 500 Colleges of Further Education now have Departments of Trade Union Studies. In addition, the UK boasts a half-dozen active residential colleges--including Hillcroft, a women's college in south east England.

A Danish spokesman noted that their experience with universities has not been particularly positive but that the difficulties appeared to be primarily due to administrative (or bureaucratic) factors rather than to factors associated with personnel. In 1979, short courses for trade union officers were offered in cooperation with university personnel for specific subjects as Economics. The results were mixed and led to the conclusion that, while a shop steward or union officer could work with university personnel or in the university locale, university teachers without trade union experience weren't able to understand what goes on in trade union groups. This sentiment was one we heard frequently in our interviews with Canadian labour leaders.

FIGURE 6-d

INTERNATIONAL COMPARISONS: Universities

THEORETICAL SPECTRUM OF UNIVERSITY INTEREST IN)
INVOLVEMENT IN) WORKERS' EDUCATION
COMMITMENT TO)

TOTAL APATHY OR EVEN HOSTILITY	SLIGHT INTEREST	MODERATE INTEREST IN W.E. (OR IN ADULT EDUCATION INCLUDING W.E.)	KEEN INTEREST ADULT EDUCATION THUS INCLUDING W.E.	REGULAR EXTERNAL PROGRAMMES FOR W.E.	REGULAR INTERNAL W.E. PROGRAMMES
May still prevail in some/many universities e.g. most Indian universities. Some German universities	Shown e.g. in a) special schemes for individual workers to enter university and/or b) occasional/casual teaching and research assistance e.g. some West German, Scandinavian and Latin American universities	Shown e.g. in a) occasional short courses of adult education/W.E. e.g. West Germany and/or b) special relationship with workers' colleges re teaching help accreditation etc. e.g. University of Wales Montreal/McGill Yugoslavia Finland/Frankfurt	Shown in serious regular programmes of adult education in which workers participate. e.g. British and C.W. universities (extra-mural pattern). Many US universities (concerned with workers individually and not collectively)	Special focus on programmes for trade unionists and workers held outside university. e.g. many American and British universities Dakar (IPESAN) (concerned with workers collectively)	May be in separate "institutes" or part of wider departments (e.g. business studies). May be all-year or sporadic; but involve regular commitment of university staff and funds. Often linked to research: sometimes adult education e.g. France (Strasbourg etc.) University of Philippines (ALEC). USA examples. Ibadan (Nigeria). LSE (UK). Ruskin College, Oxford. Korea Labour Education Research Institute
0	1	2	3	4	5

NOTES: 1) Some universities could qualify for inclusion in more than one category, since the categories are arbitrary divisions.

2) Whilst, in general, university involvement increases from left to right, a thorough programme in Category 4 (or even 3) could represent greater involvement than a sporadic programme in Category 5. No value-judgements are implied in the classification.

Source: International Labour Organisation, The Role of Universities in Workers Education. Geneva: ILO, 1974 p. 86

Section 7: Evaluation of Labour Education

No other topic was quite so certain to produce immediate comments about need, procrastination, and general lack of resources in terms of itme, funds and expertise. In the UK, Denmark and Germany, we found that a great deal of evaluative activity is carried out at the curriculum development stage of courses. However, this work tends to concentrate on the front end or design stage of the course, rather than focusing on the processes used while the course was in progress to modify the design (or formative evaluation) or on the outcome, product or consequence of the course (or summative evaluation).

Several persons noted that once they were sure that the course was efficiently designed, that the tutors' notes was comprehensible, and that the physical facilities were adequate, they were much more secure about the success of the course, even without formal evaluation procedures. Universally, those responsible for labour education programs noted that union members are famous for voting with their feet. As one person commented, "We trade union people are pretty good with our feet. We can walk into a good class, too, you know."

One unionist, from a Scandinavian country, noted that there were several attempts currently underway to evaluate labour education programs, in addition to the ongoing work in curriculum preparation. He told us that they had received a representation from the Employers Organisation which requested information to help them (the employers) design courses for leaders of the enterprises which would put them on an equal footing with the union members who had attended courses. He commented that in a small enterprise of only four or five persons, the employer/manager was hopelessly outclassed by his labour counterpart in any form of negotiations following the latter's return from a labour program on negotiation.

Another form of evaluation being engaged in by this same office, was a survey of workers to determine the cause of a drop-out level approaching 80% between sequentially organized courses. A third activity involved a survey of union members' views of social and economic policies prior to and after courses. Included in the analysis of this survey was a review of the possible contribution of the instructor's attitudes and values to those of the worker/student in such courses. A fourth project involved the review of objective data which showed that, since the introduction of large scale union education, the average number of years a worker stays in the role of shop steward has increased from two to four. While the LO did not wish to draw a causal link between the courses and the increased tenure of shop stewards, it had become a matter for conjecture which required more study.

Finally, the TUC has recently received two external, independent evaluations of its educational offerings through the Inspectorate of the DES, one for Scotland and one for England and Wales. The most telling conclusion in these evaluations, one pointed to with justifiable pride by the TUC, was that the TUC courses had received a ranking of between 2 and 3 on a six-point scale in which 1 represented university level work (i.e., doctoral level research).

We conclude with this observation by a TUC representative: "The only way to evaluate a shop stewards' course is to work at the input, not the shop steward. . . . Unless of course you can live with him on the shop floor."

Persons Interviewed for International Comparisons

Keld Andersen
Secretary for Education
Landsorganisation i Danmark (LO)
Copenhagen

T. Barinaga
Workers' Education Branch
International Labour Organization
Geneva

Prof. Marcel David
Director
Insitut des Sciences Sociales du Travail
Sorbone, University of Paris I
Paris

Mel Doyle
Assistant Secretary
Workers' Education Association
London

Douglas Gavin
Curriculum Development Unit
TUC
London

George Harvey
Education Department
Trades Union Congress
London

Roy Jackson
Secretary
Education Department
Trades Union Congress
London

Dr. Norbert Krekler
Press Secretariat
Buddesinstituts fur Berufsbildung
Bonn, West Germany

P. Lindquist
Education Officer
Swedish Trade Union Confederation
Stockholm

Cesare Poloni
Chief
Workers' Education Branch
International Labour Organization
Geneva

R. Ray
Institute for Labour Studies
Geneva

Larry Wagg
Trade and Industry
Canadian High Commission
London

Dr. George Wedell
Head of Division
Employment Synthesis and Community Action
European Economic Community
Brussels, Belgium

John R.W. Whithouse
Director
International Labour Organization
Ottawa

Centre for Education Research and Innovation
O.E.C.D. (CERI/OECD)
Paris

John Lowe

Hans Schutze

Ken Pankhurst

Jarl Bengsston

Kathleen Kelley

David Thomas

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APPENDICES

APPENDIX A.

File Nos.: 3925-52

Contracts D1(14)

THIS AGREEMENT made in duplicate this 11th day of March A.D. 1980.

BETWEEN:

HER MAJESTY THE QUEEN in right of Canada (hereinafter called "Her Majesty") herein acting through and represented by the Minister of Labour (hereinafter called "the Minister")

OF THE FIRST PART

AND:

ONTARIO INSTITUTE FOR STUDIES IN EDUCATION, 252 Bloor Street, in the City of Toronto, in the Province of Ontario (hereinafter called "the contractor")

OF THE SECOND PART

WITNESSETH THAT:

WHEREAS the Minister is desirous of entering into an arrangement for the preparation of a preliminary evaluation of the educational activities conducted in the first 2 years through the Department of Labour's Labour Education programme, and

WHEREAS the contractor has represented to the Minister that it will, under the direction of Dr. David S. Abbey as principal investigator, and Dr. Alan Thomas as consultative investigator, provide the aforementioned service;

NOW, THEREFORE, THESE PRESENTS WITNESSETH that in consideration of the premises and of the payment to the contractor of the amounts hereinafter specified upon the terms and conditions set forth, and in consideration of the due performance by the contractor of the duties specified, the parties hereto covenant and agree as follows:

1. SUBJECT MATTER

It is understood and agreed that:

(a) the aforementioned evaluation will assess the processes and physical scope of the activities, with respect to geographic, demographic and functional distributions, and also where possible, the quality of the product, viz., the competence of the participants to perform their union and citizen responsibilities, and the extent the new educational experiences and qualifications are put to use;

(b) the evaluation will use the model and questionnaire previously developed (Ref. 77-204; File Nos. 3925-52, Contracts D1(12);

(c) the contractor is also to make recommendations, if necessary, on ways and means of improving or expanding the delivery and utilization of the Programme.

2. PROJECT AUTHORITY

Mr. Gower Markle, Coordinator of Labour Education, Employment Relations Branch, Labour Canada, Ottawa, Ontario, K1A 0J2, is hereby designated as the Project Officer for the purposes of this Agreement and such designation shall extend to all persons acting under the instructions of the said Director.

3. COMMENCEMENT AND DURATION

It is understood and agreed that the work referred to herein will commence at once upon execution of this Agreement, and will be completed with the submission of a report to the Project Authority not later than September 30, 1980. (See attached schedule).

4. REMUNERATION

The Minister agrees to pay the contractor a fee of twenty-five thousand dollars ($25,000.00) for the evaluation, $20,000.00 of which is to be paid in the form of an advance on execution of this Agreement, and a final payment of $5,000.00 on receipt and acceptance by the Project Authority of the aforementioned final report, and submission of a financial statement on the actual cost of the project.

5. FINANCIAL LIMITATION

The contractor undertakes and agrees to use his best effort to perform and complete the work set out above, within the time and in accordance with the terms and conditions herein set forth, it being understood and agreed that liability to the contractor shall not, unless authorized in writing by the Minister, exceed the total sum of twenty-five thousand dollars ($25,000.00) with respect to fees, expenses or otherwise, and that the contractor shall not be obligated to perform any services hereunder which would cause the said sum to be exceeded.

6. INDEMNIFICATION

It is understood and agreed that the contractor shall save harmless Her Majesty from and against all claims, demands, actions, causes of actions or other proceedings by whomsoever made, brought or prosecuted in any manner, based upon, arising out of, or in any way connected with this Agreement.

7. ASSIGNMENT

It is understood and agreed that no part of the work to be performed by the contractor hereunder will be assigned by the contractor without the prior consent in writing of the Minister.

8. TERMINATION

It is understood and agreed that the Minister may at any time by notice in writing direct the contractor to discontinue his services herein, and in such event, the contractor will forthwith discontinue his services and shall have no further claim hereunder except for such services as shall have been performed prior to the date of termination, which services shall be paid for pro-rata at the rates hereinbefore set forth.

9. NOTICE

Any notice to the contractor hereunder shall be effectively given if sent by letter or by telegram, postage pre-paid, or with charges pre-paid as the case may be, addressed to the contractor at its address as given in the Agreement. Any notice so given shall be deemed to have been received by the contractor at the time when in the ordinary course such letter or telegram should have reached its destination.

10. NO BRIBE, ETC.

The contractor warrants

(a) that no bribe, gift or other inducement has been paid, given, promised or offered to any official or employee of Her Majesty for, or with a view to the obtaining of the Agreement by the contractor, and

(b) that it has not employed any person to solicit or secure the Agreement upon any agreement for a commission, percentage, brokerage or contingent fee.

11. MEMBERS OF THE HOUSE OF COMMONS

No member of the House of Commons shall be admitted to any share or part of the Agreement or to any benefit to arise therefrom.

12. NOT AN EMPLOYEE

It is understood and agreed that this Agreement is a contract for the performance of a service and that the contractor is engaged as an independent contractor and shall not upon the execution of this Agreement become an employee or agent of Her Majesty.

13. CONFIDENTIALITY

It is understood and agreed that the contractor shall treat as confidential during as well as after the rendering of the services referred to herein, any information of a character confidential to the affairs of Her Majesty to which it becomes privy as a result of its acting as contractor.

14. TITLE AND PUBLICATION

It is understood and agreed that the Minister reserves the right to publish in whole or in part, to publish an amended version or not to publish at all as he deems fit, any research, reports, papers, material, or information produced in the performance of this Agreement.

15. PRIOR NEGOTIATIONS SUPERSEDED

This Agreement shall be deemed to constitute the entire Agreement between the parties hereto with respect to the subject matter hereof and shall supersede all previous negotiations and documents in relation thereto.

IN WITNESS WHEREOF and in accordance with the Financial Administration Act and Part III of the Government Contract Regulations, this Agreement has been executed and sealed on behalf of Her Majesty the Queen in right of Canada by the Minister of Labour, and by the contractor in its corporate name with its corporate seal hereto affixed and attested by the hands of its duly authorized officers.

SIGNED, SEALED AND DEVLIERED)

in the presence of)

Certified as to form and legality,
R. G. Butler 22 Dec 1980

Minister of Labour

Ontario Institute for Studies in Education

Labour Canada
Travail Canada

September 12, 1980

Dr. Alan Thomas and Dr. David Abbey
Department of Adult Education
The Ontario Institute for
Studies in Education
252 Bloor Street West
Toronto, Ontario
M5S 1V6

Dear Alan and David:

RE: Preliminary Evaluation, Labour Education Program
Contract D1(14) - File 3925-52

This refers to your letter of July 15, 1980 in which you expressed concern over the difficulties in obtaining the necessary co-operation to fulfill Clause (1)(e) of the amended contract in relation to your responsibility of supervising and integrating the result of the evaluation of the Francophone constituency of the program into the final report.

We appreciate the attempts that were made in this regard.

1. Your meeting of April 18, 1980 with Bourgeault and Hernandez which is summarized in your letter of April 24 to Bourgeault.
2. The unsuccessful attempt for a second meeting with Bourgeault and Hernandez in Toronto on April 30, 1980 which is dealt with in your letter of April 30, 1980 to Bourgeault.
3. Peter Finestone's letter of May 5, 1980 to Bourgeault asking for assistance in this project.

It is evident that the circumstances that prevent you from fulfilling Clause (1)(e) of the contract are beyond your control. However, to compensate for the large number of participants that you have interviewed on the Program we agree to waive out this responsibility in favour of a separate report, by the University of Montreal, on the Program activities in the Province of Quebec and a separate report, by the Ontario Institute for Studies in Education, covering all other provinces.

Yours sincerely,

Gower Markle, Director
Employment Relations and Conditions of Work

Canada Department of Labour
Ministère du Travail du Canada

T.B. No. 775183

File Nos. 3925-52

Contracts D1(14)

THIS AGREEMENT made in duplicate this 25th day of MARCH A.D.1981.

BETWEEN:

HER MAJESTY THE QUEEN in right of Canada (hereinafter called "Her Majesty") herein acting through and represented by the Minister of Labour (hereinafter called "the Minister")

OF THE FIRST PART

AND:

ONTARIO INSTITUTE FOR STUDIES IN EDUCATION, 252 Bloor Street West, in the City of Toronto, in the Province of Ontario (hereinafter called "the contractor")

OF THE SECOND PART

WITNESSETH THAT:

WHEREAS the Minister has a requirement for an evaluation of the educational activities conducted in years 3 and 4 through the Canada Department of Labour's Labour Education Financial Support Program, and to combine the results of this evaluation with the preliminary evaluation on years 1 and 2 into one report, and

WHEREAS the contractor has represented to the Minister that it will, under the direction of Dr. Alan Thomas and Dr. David Abbey, as principal investigators, provide the aforementioned service;

NOW, THEREFORE, THESE PRESENTS WITNESSETH that in consideration of the premises and of the payment to the contractor of the amounts hereinafter specified upon the terms and conditions set forth, and in consideration of the due performance by the contractor of the duties specified, the parties hereto covenant and agree as follows:

1. SUBJECT MATTER

It is understood and agreed that:

(a) the evaluation will:

(i) assess the processes and physical scope of the activities, with respect to geographic, demographic and functional distributions, and also, where possible, the quality of the product, viz., the competence of the participants to perform their union and citizen responsibilities, and the extent the new educational experience and qualifications are put to use. The evaluation is to be based on, as many as possible, of the indicators attached to this submission and is to cover all of Canada except the activities by the Quebec Federation of Labour, the Confederation of National Trade Unions, the Centrale des syndicats democratiques and the independent unions in the Province of Quebec;

(ii) combine the activities during years 1 to 4 of the Program into one report and compare the Canadian Labour Education Financial Assistance Program with similar programs in other parts of the world such as Australiaaand European countries;

(iii) make recommendations, if necessary, on ways and means of improving the delivery and utilization of the Program.

(b) the contractor will submit its reports in accordance with the following schedule:

(i) September 30, 1981 - a progress report covering the following points: updating of the preliminary report, account of data gathering plans for evaluation of activities of years 3 and 4, final evaluation on scholarships and bursaries for years 3 and 4, and observations on future evaluations;

(ii) December 31, 1981 - delivery of the report on the complete evaluation for years 3 and 4;

(iii) March 15, 1982 - delivery of the final report including combination of reports on years 1 and 2, and years 3 and 4, with some international comparisons.

(c) The investigators will utilize additional personnel as required to assemble data and to conduct interviews and to complete the analysis. This may require travel throughout Canada.

PROJECT AUTHORITY

The Associate Co-ordinator, Labour Education Program, Employment Relations and Conditions of Work Branch, Labour Canada, Ottawa, Ontario, K1A 0J2, is hereby designated as the Project Officer for the purposes of this Agreement and such designation shall extend to all persons acting under the instructions of the said Associate Co-ordinator.

3. COMMENCEMENT AND DURATION

It is understood and agreed that the work referred to herein will commence upon execution of this Agreement, and will be completed upon submission of a final report to the Project Authority, no later than March 15, 1982.

4. PAYMENT

The Minister agrees to pay and reimburse the contractor in accordance with the following schedule:

(a)	April 1, 1981	$30,000.00
(b)	December 31, 1981, upon receipt of the evaluation report for years 3 and 4	$30,000.00
(c)	Upon receipt of the final report no later than March 15, 1982	$19,000.00
	Total:	$79,000.00

5. FINANCIAL LIMITATION

The contractor undertakes and agrees to use his best effort to perform and complete the work set out above, within the time and in accordance with the terms and conditions herein set forth, it being understood and agreed that liability to the contractor shall not, unless authorized in writing by the Minister, exceed the total sum of seventy-nine thousand dollars ($79,000.00) with respect to fees, expenses or otherwise, and that the contractor shall not be obligated to perform any services hereunder which would cause the said sum to be exceeded.

6. INDEMNIFICATION

It is understood and agreed that the contractor shall save harmless Her Majesty from and against all claims, demands, actions, causes of actions or other proceedings by whomsoever made, brought or prosecuted in any manner, based upon arising out of, or in any way connected with this Agreement.

7. ASSIGNMENT

It is understood and agreed that no part of the work to be performed by the contractor hereunder will be assigned by the contractor without the prior consent in writing of the Minister.

8. TERMINATION

It is understood and agreed that the Minister may at any time by notice in writing direct the contractor to discontinue his services herein, and in such event, the contractor will forthwith discontinue his services and shall have no further claim hereunder except for such services as shall have been performed prior to the date of termination, which services shall be paid for pro-rata at the rates hereinbefore set forth.

9. NOTICE

Any notice to the contractor hereunder shall be effectively given if sent by letter or by telegram, postage pre-paid, or with charges pre-paid as the case may be, addresssed to the contractor at its address as given in the Agreement. Any notice so given shall be deemed to have been received by the contractor at the time when in the ordinary course such letter or telegram should have reached its destination.

10. NO BRIBE, ETC.

The contractor warrants

(a) that no bribe, gift or other inducement has been paid, given, promised or offered to any official or employee of Her Majesty for, or with a view to the obtaining of the Agreement by the contractor, and

(b) that it has not employed any person to solicit or secure the Agreement upon any agreement for a commission, percentage, brokerage or contingent fee.

11. MEMBERS OF THE HOUSE OF COMMONS

No member of the House of Commons shall be admitted to any share or part of the Agreement or to any benefit to arise therefrom.

12. NOT AN EMPLOYEE

It is understood and agreed that this Agreement is a contract for the performance of a service and that the contractor is engaged as an independent contractor and shall not upon the execution of this Agreement become an employee or agent of Her Majesty.

13. CONFIDENTIALITY

It is understood and agreed that the contractor shall treat as confidential during as well as after the rendering of the services referred to herein, any information of a character confidential to the affairs of Her Majesty to which it becomes privy as a result of its acting as contractor.

14. TITLE AND PUBLICATION

It is understood and agreed that the Minister reserves the right to publish in whole or in part, to publish an amended version or not to publish at all as he deems fit, any research, reports, papers, material, or information produced in the performance of this Agreement. The contractor may be authorized to use or publish this material upon submission of a request to the Minister.

15. PRIOR NEGOTIATIONS SUPERSEDED

This Agreement shall be deemed to constitute the entire Agreement between the parties hereto with respect to the subject matter hereof and shall supersede all previous negotiations and documents in relation thereto.

IN WITNESS WHEREOF THE PARTIES HAVE CAUSED THIS AGREEMENT TO BE EXECUTED UNDER SEAL BY THEIR DULY AUTHORIZED REPRESENTATIVES ON THE DAY AND YEAR FIRST ABOVE WRITTEN

SIGNED, SEALED AND DELIVERED)
in the presence of)

Certified as to
Form and Legality
G.J. Roach
A.J. ROACH
Solicitor Mar 23, 1981.

G Brault

Minister of Labour

Mar 19/81

x Bernard J. Shapiro
Ontario Institute for Studies in Education

APPENDIX B.

The Indicators

Early discussions with representatives of the Treasury Board indicated their strong interest in going beyond the terms of our contract with Labour Canada in order to establish a list of agreed upon indicators of success for the LEP. The assumption was that, if this could be done, subsequent evaluations could test for the presence or absence of such indicators.

By implication, the existing contracts with the federated labour organizations suggest that the principal means for reaching the four stated government objectives would be through programs of labour education. Some suggested plans for the conduct of labour education programs were also included in the contracts. However, the contracts themselves were imbedded in a series of unstated expectations concerning the nature of labour education, or education carried out in the context of a labour organization.

It was the task of the primary evaluation to ascertain that educational programs were being carried out effectively, in a manner and on a scale reflecting the federal contributions, and conforming to the stated demands and expectations of the government contract. The opportunity for exchange and investigation was such as to allow some exploration of the degree to which labour education, as it was being carried out, did, in fact, contribute to the realization of both explicitly and implicitly stated objectives and assumptions of the federal government. In effect, these objectives and assumptions were accepted by the federated labour organizations by the fact of entering into the agreements with the LEP. A second level of evaluation attempted to examine the viability of various indicators of success in relation to these objectives and assumptions.

Earlier work done by Abbey and George (File nos. 3925-52, Contract D1(12), April 13, 1978) had laid the foundations for this second level of evaluation by examining the stated goals of the federal government and associated documents. The researchers had arrived at a more comprehensive statement of objectives and delineated these by level of impact or audience. The Table shown in Appendix C lists the objectives and the Figure shown in Appendix D schematically displays their level of impact within the Canadian social framework. Furthermore, the researchers translated these documents into a series of behavioral categories which would have allowed Labour Canada to obtain a regular assessment of the educational activities in the LEP. Unfortunately, the implementation of this work was interrupted by budget considerations and, therefore, valuable data of this kind was missing at the start of this investigation.

On the basis of the work done by Abbey and George, the various documents associated with the LEP have been reanalyzed. The earlier model of levels of intervention into the system and the types of outcomes sought was extended and revised. The Statement of Objectives by Level and Outcome was compiled and is shown in Appendix E. This list indicates the quotation and source associated with each objective.

The Treasury Board and Labour Canada both recognized that the present LEP is a cooperative program and that any useful set of indicators must, at the very least, be understood by all parties, if not entirely agreed upon. Different indicators were acknowledged to be salient to different parties and different needs, none of which could be ignored or underestimated. Therefore, part of our evaluation activities were designed to obtain the perceptions of various labour leaders, labour educators, and LEP participants on the viability and importance of behaviours which might be indicative of the successful achievement of each objective. We then explored the range of acceptance and agreement among the opinions. The difference between acceptance and agreement is subtle but important.

One can accept the fact that a certain type of behaviour is legitimate, relevant and important. One can still disagree, however, as to what observable behaviour should be considered as an indicator of the desired outcome. With respect to many of the objectives outlined in Appendix E, there was little difficulty in obtaining acceptance and agreement on an indicator. With others (e.g. 3.1 Equalization and Accessibility), there was a range of disagreement with respect to what types of public funding should be compared in order to judge equity of treatment. Some contended that investment in labour education should be compared with expenditures on public post-secondary education; while others claimed that the only fair comparison was with public expenditures on management education. This is a form of education which is attended by tax allowances representing foregone public income in addition to direct expenditures on courses and seminars.

Reaching agreement on equalization, however, was relatively easy in comparison to the problems posed by objective 2.1 (ii)--the encouragement of smoother collective bargaining, which proved to be an area of great interest to representatives of the Treasury Board. The acknowledged ideological differences which inform labour education and which make a program such as the LEP necessary cut across this measure directly. For some members of labour, smoother collective bargaining is characterized by better organized industrial actions of various kinds; for others, by fewer disruptions during the industrial action; and for still others by more effective competition with management in the sharing of the benefits of the industrial state. These disagreements occur within the labour movement itself. A brief excursion beyond the ranks of the labour movement indicates even wider and sharper disagreements. For this objective, therefore, we would only be able to produce a series of indicators which would be relevant to the collective aspirations and objectives of the labour movement, management, and various governments; but would not indicate any level of agreement.

Appendix F presents a compilation and delineation of those indicators for which there was some expression of agreement and acceptance. Although lacking in agreement on the ways in which it could be improved, this table is not without value. It can serve as an operational list of the type of information which can be gathered if an extensive study of the outcomes of the LEP is to be conducted. In an effort to establish whether or not this type of information was available and could be collected, a participant telephone interview questionnaire was developed. This questionnaire was piloted in the preliminary evaluation conducted on the first two years of the LEP and was used extensively in the second evaluation of the third and fourth years of the LEP. The report of this second evaluation are to be found in Chapters 1 and 2 of the attached report. The final form of the telephone questionnaire is provided in Appendix I, and a mailed version in Appendix J.

It is clear to the evaluators that this type of analysis of documents, personal interviews, the creation of indicators, and the development of telephoned and mailed questionnaires is a methodology which can be successfully followed in subsequent evaluations. Our experience suggests that, while this work is costly, the process of developing and implementing the questionnaire raises questions and provides answers which could not be obtained in any other way. The experience of others indicates that "for large programmes using conventional methods summative evaluation might run up to 2% of the total (project) cost. Smaller programmes, and highly controversial programmes may need 5%" (Stake, Evaluating Educational Programmes: The Need and Response. Paris: OECD, 1976, p. 29).

APPENDIX C.

LABOUR EDUCATION PROGRAM

Statement of Objectives

1. UNION MEMBERSHIP

    1.1 Promote greater sense of responsibility between labour and management.

    1.2 Promote greater sense of responsibility between labour and general public.

    1.3 Increase knowledge of union members for effective participation in Labour Movement.

    1.4 Encourage responsible participation of unions and Labour Movement in society.

2. LABOUR FORCE

    2.1 Assist labour leaders and potential labour leaders to acquire more comprehensive knowledge and understanding of the structure, goals, policies, and responsibilities of the Canadian Labour Movement.

3. PUBLIC IN GENERAL

    3.1 Encourage better informed union membership and smoother collective bargaining.

    3.2 Help fuller and more knowledgeable participation in social and economic affairs.

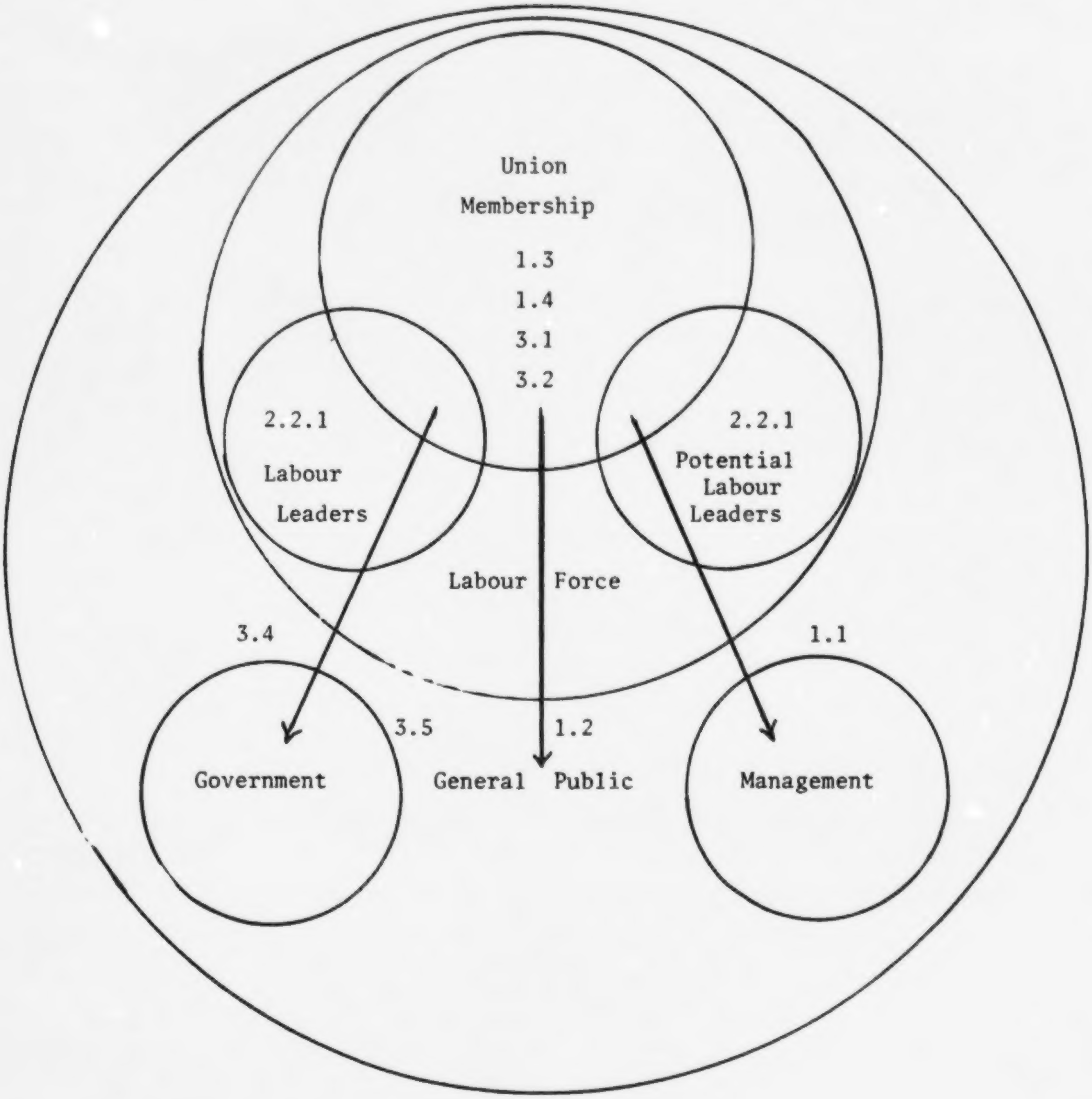
    3.3 Distribute educational funds more equitably.

    3.4 Establish immediate and real programmatic links between government and the Labour Movement.

    3.5 Improve climate in government-labour relations.

APPENDIX D.

Relation of Labour, Management and Government as reflected in Treasury Board Objectives for the Labour Education Program


Union
Membership
1.3
1.4
3.1
3.2
2.2.1
Labour
Leaders
2.2.1
Potential
Labour
Leaders
Labour Force
3.4
1.1
3.5
1.2
Government
General Public
Management

APPENDIX E.

Statements of Objectives by Level and Outcome for the Labour Education Program

1. LABOUR MEMBERS' CHANGE

1.1 FUNCTIONING AS A UNION MEMBER:

Statements:

(i) "To encourage a better informed union membership"
(Annual Report, Labour Canada, 1977-1978).

(ii) "To acquire the knowledge and skills necessary for the discharge of their duties in the labour movement"
(Ministerial Briefing Book, February 1980).

(iii) "Increased knowledge of union members for effective participation in labour movement
(T. B. Document, May 6, 1977, Remark 1)*

(iv) "Assist labour leaders and potential labour leaders to acquire comprehensive knowledge and understanding of structure, goals, policies and responsibilities of the Canadian Labour Movement"
(T. B. Document, May 6, 1977, Remark 2).

1.2 PRACTICE OF SOCIAL ROLE

Statements:

(i) "To help fuller and more knowledgeable participation in social and economic affairs"
(T. B. Document, May 6, 1977, Remark 3).

2. LABOUR MOVEMENT'S CHANGE

2.1 OPERATION OF THE INDUSTRIAL RELATIONS SYSTEM

Statements:

(i) "Improving the operation of the industrial relations system by providing current and potential union officers and other members of labour organizations with opportunities to acquire a comprehensive knowledge and understanding of goals, policies, and responsibilities of the Canadian Labour Movement in the context of the economic, political, and social framework of Canada"
(Ministerial Briefing Book, February 1980).

(ii) "Encourage "smoother" collective bargaining"
(Annual Report, Labour Canada, 1977-1978).

(iii) "Promote greater sense of responsibility between labour and management"
(T. B. Document, May 6, 1977, Remark 1).

2.2 PRACTICE OF SOCIAL ROLE

Statements:

(i) "To encourage responsible participation of unions and labour movement in society"
(T. B. Document, May 1978, Remark 1).

(ii) "To promote greater sense of responsibility between labour movement and general public"
(T. B. Document, May 1978, Remark 1).

(iii) "To help labour to participate more fully and knowledgeably in social and economic affairs"
(Annual Report, Labour Canada, 1977-1978).

2.3 INCREASED EDUCATIONAL PROGRAM

Statements:

(i) "To encourage union organizations to expand existing labour education programs and to develop new programs for their members through the provision of financial assistance"
(Ministerial Briefing Book, February 1980).

3. SOCIAL SYSTEM'S CHANGE

3.1 EQUALIZATION AND ACCESSIBILITY

Statements:

(i) "To achieve more equitable distribution of educational support"
(Ministerial Briefing Book, December 1979).

3.2 POST-SECONDARY INVOLVEMENT

Statements:

(i) "To encourage post-secondary institutions to develop and operate courses and to carry out research in support of the labour movement's endeavours in labour education through the provision of grants"
(Ministerial Briefing Book, February 1980).

*Approved in principle for inclusion of an item in supplementary estimates (A) 1977-78, May 6, 1977.

The above quotations are edited.

APPENDIX F.

INDICATORS for EVALUATING LABOUR EDUCATION PROGRAMS

I. Changes in the Individual Worker

A. As individual within union

( ) Interest and activity in union

( ) Mobility within union

( ) Use of leadership skills (e.g., using parliamentary procedures, managing meetings, relating to others, etc.

( ) Assuming responsibilities in union affairs

( ) Participating in decision-making

( ) Spread of learning to other workers

( ) Requests made of elected representatives

( ) Awareness of and supervision of union employees

( ) Participating in union sponsored educational activities

( ) Attending meetings

( ) Involvement in occupational health and safety and quality of work life issues

( ) Acquiring and using specialized union skills

( ) Other

B. As individual within family, social and community affairs

( ) Interest in and requests for formal and informal education

( ) Family involvement in formal and informal education

( ) Family understanding of union activities

( ) Use of leadership skills (e.g., both oral and written communicating skills, relating to others, etc.)

( ) Involvement in civic affairs

( ) Voluntary activities in community

( ) Participation on management, policy and/or advisory boards of community organizations and institutions

( ) Other

II. Changes in the Labour Movement

C. Industrial relations/ Relationship to management

( ) Type and number of grievances presented

( ) Stage in procedure at which grievance is resolved

( ) Type and number of grievances immediately following an agreement

( ) Duration and nature of industrial action (e.g., slow-downs, work-to-rule, strikes, etc.)

( ) Perception of relations between labour management & government

( ) Ability to negotiate

( ) Ability to handle grievances

( ) Acquiring and using specialized union skills (e.g., inquiry, legal procedures, recording evidence, etc.)

( ) Percentage of members in favour of settlement/ contract ratification

( ) Action in occupational health and safety issues

( ) Action in quality of work life issues

( ) Other

D. Union's relationships to other community organizations and institutions

( ) Numbers of briefs presented to governments (local, provincial, and federal).

( ) Activity on government boards and other boards of inquiry

( ) Involvement in the development of social programs

( ) Financial commitment to social relief

( ) Awareness of and response to health and safety issues within community.

( ) Involvement in development of education programs in co-operation with other organizations

( ) Representation on advisory, policy or management committees

( ) Other

E. Educational Programs of union

( ) Numbers of unions/ locals participating

( ) Numbers of unions/ locals establishing own educational programs

( ) Numbers of individuals participating

( ) Development of instructors

( ) Numbers of programs developed & offered

( ) Requests for additional and higher level programs

( ) Development and utilization of instructional resources

( ) Function and union position of participants in programs

( ) Age and sex of participants

( ) Policy on paid educational leave

( ) Leadership's commitment to education (e.g., ratio of union $ spent to government $ granted, etc.)

( ) Other

INDICATORS (continued)

III. Change in the Social System

F. Equalization and Access

( ) $ spent by social system on education

( ) $ per capita spent on management education vs. $ per capita spent on labour education

( ) Availability of tax relief for labour education

( ) Other

G. Post-Secondary Education

( ) Numbers of courses in labour-related fields

( ) Variety of courses

( ) Requests for courses

( ) Numbers of studies on labour-related topics

( ) Development of instructional materials

( ) Dissemination of instructional materials

( ) Development of resource centres, libraries

( ) Advisory committees and other communication systems

( ) Other

APPENDIX G.

Evaluative Perspectives of Various Interest Groups Involved in LEP

1. Labour Canada

All federal public service agencies have been required to consider activities related to the comprehensive evaluation of their programs. These activities take the form of specific guidelines (such as "Evaluation of Programs by Departments and Agencies", guideline 77-47) which attempt to meet the requirement of Treasury Board Policy; the establishment of evaluation specialist positions within ministeries; and a general concern for accountability. The bywords in our various discussions about program evaluation have become "The Three E's: Economy, Efficiency, and Effectiveness".

Labour Canada has needed to adequately evaluate its programs. In the particular case of the LEP, the requirement for cooperative evaluations at the end of the second and fourth years of the initial five years of the program was explicitly noted in the contracts signed with the major federations and yearly evaluations were specified as a pre-condition for receipt of the second payment (25%) of any grant, bursary or contribution. In addition to these contractual obligations for evaluation, Labour Canada expressed a need to have a comprehensive evaluation which included its own role in the planning and operations of the various components of the program. Personnel within the Ministry expressed a need for an evaluation which would answer questions on three levels:

i. How well are we doing in our administration of the various parts of the LEP for which we are responsible?

ii. How are the funds being used by others in support of new or expanded educational opportunities?

iii. What is the impact on participants of the educational activities funded under the LEP?

2. Treasury Board

In meetings with Treasury Board personnel responsible for the LEP, it was clear that several types of information had been identified by them as valued contributions to the decisions which would need to be made concerning continuing and/or altering the level and type of support provided by the LEP. In discussions concerning the LEP, it was clear that Treasury Board needs were extensive and ranged from a clear-cut evaluation of the financial management of the project and the legitimacy with which funds were expended, to an evaluation of the ultimate impact of the program on individual members of labour organizations.

Our initial contacts with Treasury Board indicated that, in relation to the evaluation of the LEP, they would be interested not only in factors such as participation rates and scope of offerings, but also in indicators of the extent and manner to which the broad program objectives (see Appendix C) were being achieved.

3. The Labour Movement

Under the terms of the contracts signed between Labour Canada and the various federated labour organizations, the only explicit demand was that there be an evaluation at the end of the second and fourth years of the program. Early discussions with senior officials in these organizations indicated that there was a desire for information which would answer the general question, "How well are we doing in our attempts to create new educational opportunities?". It was clear from these discussions that, while there was an interest in the general evaluation of the LEP, the "we" in the preceding sentence referred to the labour organization to which the specific speaker belonged and to the specific educational program with which he/she was familiar.

Thus, the evaluative perspective of persons within the labour movement can be seen to be focused first on immediate attempts by labour organizations to implement new or expand existing programs, and second on the broad multi-tiered set of operations and objectives of the LEP. Labour personnel with whom we talked invariably expressed the view that if we found that money was being spent unwisely, or that programs were not having desired effects, or that there were obvious short-comings which could be corrected, they wanted this information as soon as possible in order to take corrective action. In addition, most labour personnel expressed a strong desire to know what others were doing with LEP funding and what the impacts of other labour education programs were.

For the independent labour organizations and bursary recipients, there were no contractual demands for participation in an overall evaluation of the LEP. Most did not expect to have contact with an external evaluator, in some cases nearly 24 months after completion of their program. In almost all cases, however, we found a strong interest in cooperating with us, a willingness to provide whatever data could be collected or retrieved from files, and a desire to know how the various levels of the LEP were succeeding. In some cases local evaluations had been conducted and there was considerable interest in sharing these with us and in making comparisons with other evaluations of other parts of the total program.

4. The External Evaluators

There are many ways to proceed with an external evaluation and many questions which could be asked. Each approach reflects a different perspective and each gives rise to a different set of evaluative activities. Each requires different types of data and gives rise to vastly different final reports.

Our role as external evalutors of the LEP is partially dependent on the context of the institute and social system within which we operate. We started from a position embodying a conflict of interest. As a post-secondary institution we are a member of one of the original recipients of funds from the LEP. The present evaluation, however, was not conducted with support from that segment of the program. We were, however, involved in an earlier contract which attempted to lay the groundwork for this evaluation of the LEP. Under a small ($5,000) contract from Labour Canada, the objectives of the program were studied and a data collection system was designed by one of the present project directors (D.S.A.). This contract ultimately formed the basis for the evaluation questionnaire which is completed by independent labour organizations which have received grants from the LEP. The other project director (A.M.T.) served on the National Advisory Council on Labour Education for the period of September 1977 to April 1978, and was involved in the scrutiny and approval of many of the post-secondary applications. While these early involvements with the LEP may be seen as a possible source of bias, they are also experiences which have given us insight into the nature of the program from its inception and which have given us firsthand contact with the personnel and with some of the statistical data needed as part of this evaluation.

Our location in the Department of Adult Education, OISE, also dictates that we seek to expand our own knowledge of all forms of adult education in general, as well as increasing our understanding of the LEP in particular. We did not see our role as confined solely to providing an evaluation service. On the contrary, we accepted the contract because we believe that our interests, as well as those of the other participants in the LEP, would be served. We can provide an evaluation service as part of our study of adult education and of labour education.

Our evaluative perspective gives rise to a problem which is perennial in conducting evaluation studies. One stance would be to have the evaluation remain descriptive, without evaluative comment, of such factors as input, output, operations, costs, and benefits. Another stance would be to make evaluative comments about the LEP whenever these seem appropriate and within the competence of the evaluators. Such evaluative comments can extend to assessments of the quality of portions of labour education programs (e.g. the quality of audiovisual productions, the adequacy of record-keeping systems, the apparent satisfaction of participants in workshops), to comments on the objectives of the LEP and on the decisions which led to the design and operations of various component parts of the program.

In the terms of reference established in our contract with Labour Canada, we agreed to accept the responsibility to assess the quality of the product, where possible; and to make recommendations to improve or expand the delivery or utilization of the LEP. We have, therefore, assumed the role of critical evaluator and have attempted to make our evaluative comments, assessments, and recommendations within the limits of our competencies as adult educators.

APPENDIX H.

INDIVIDUALS CONSULTED BY MEMBERS OF RESEARCH TEAM

Christen Anderson	Bursary Recipient Telephone Workers Union Burnaby, British Columbia
Robert Anderson	Industrial Training Consultant Confederation College Thunder Bay, Ontario
Harry Antonides	Director of Research and Education Christian Labour Association of Canada Rexdale, Ontario
J. H. Arbeau	Assistant Regional Director Atlantic Region Labour Canada Moncton, New Brunswick
Douglas Baldwin	Coordinator, Labour Education Program Employment Relations Branch Labour Canada Ottawa, Ontario
Thomas Beaton	Regional Director Great Lakes Region Labour Canada Willowdale, Ontario
Tony Belcher	Director of Education Government Employees Union Burnaby, British Columbia
John Besse	Bursary Recipient International Wookworkers of America New Westminster, British Columbia
Jean Bezusky	Associate Registrar Labour College of Canada Ottawa, Ontario
Jack Blaney	Dean of Continuing Education Simon Fraser University Burnaby, British Columbia
Clare Booker	Assistant to the Director of Education Canadian Labour Congress Ottawa, Ontario

James Brechin	Director of Educational Services Canadian Labour Congress Ottawa, Ontario
Lorne Campbell	Supervisor of Labour Studies Program Confederation College Thunder Bay, Ontario
Marjorie Carver	Resource Centre Labour Education & Studies Centre Canadian Labour Congress Ottawa, Ontario
Peter Dent	Education Director Registered Nurses Association of B. C. Vancouver, British Columbia
Ron Douglas	Research Director Western Region Canadian Conference of Teamsters Vancouver, British Columbia
Norman Draper	Secretary Thunder Bay Labour Council Thunder Bay, Ontario
Bruce Elphinstone	Business Agent International Woodworkers of America New Westminster, British Columbia
Glenn Farrel	Director of University Extension University of Victoria Victoria, British Columbia
Norman Fergusson	Executive-Secretary Nova Scotia Teachers Union Armdale, Nova Scotia
René Fortin	Education Officer United Steelworkers of America, Local 6500 Sudbury, Ontario
Marvin Gandall	Staff Officer Economists, Sociologists & Statisticians Ottawa, Ontario
Arthur Gibbons	Regional Director Mountain Region Labour Canada Vancouver, British Columbia

Rodney Gilmour	Director Police Association of Ontario Mississauga, Ontario
Joe Grogan	Director Centre for Labour Studies Humber College Rexdale, Ontario
Mary A. Guttman	Member, Faculty Association Ontario Institute for Studies in Education Toronto, Ontario
Bert Hepworth	Former Director of Educational Services Canadian Labour Congress Ottawa, Ontario
Harry Jacks	Special Projects Officer Employment Relations Branch Labour Canada Ottawa, Ontario
Norman Kennedy	President Independent Nylon Workers Union Kingston, Ontario
Art Kube	Director of Education Pacific Region Canadian Labour Congress Burnaby, British Columbia
Jindra Kulich	Dean, Centre for Continuing Studies University of British Columbia Vancouver, British Columbia
Edouard Levelle	Chairman, Labour Studies Program Capilano College Vancouver, British Columbia
Clive Lytle	Coordinator, Labour Education Simon Fraser University Burnaby, British Columbia
Harry MacKenzie	Assistant Regional Director Mountain Region Labour Canada Vancouver, British Columbia
Alan MacLeod	Research Officer Government Professional Employees Association Victoria, British Columbia

Daniel MacNeil	Bursary Recipient Victoria Grain Workers Union Vancouver, British Columbia
Julien Major	Vice-President Canadian Labour Congress Ottawa, Ontario
Ray Marchand	Associate Coordinator Labour Education Program Employment Relations Branch Labour Canada Ottawa, Ontario
Gower Markle	Consultant Employment Relations Branch Labour Canada Ottawa, Ontario
D'Arcy Martin	Education Director United Steelworkers of America Toronto, Ontario
Judith Mastai	Continuing Education Simon Fraser University Burnaby, British Columbia
Ronald Mattey	Regional Director Central Region Labour Canada Winnipeg, Manitoba
Jean Minish	Labour Relations Officer Manitoba Organization of Nurses Association Winnipeg, Manitoba
John Morris	Director, University Extension University of New Brunswick Fredericton, New Brunswick
Joseph Morris	Past-President Canadian Labour Congress Victoria, British Columbia
Edward Murphy	Coordinator Atlantic Region Labour Education Centre Sydney, Nova Scotia
Greg Murtagh	Director Labour Education & Studies Centre Canadian Labour Congress Ottawa, Ontario

Wayne Nightingale	Executive Director New Brunswick Teachers Federation Fredericton, New Brunswick
Dave Patterson	President, Local 6500 United Steelworkers of America Sudbury, Ontario
Thomas Patterson	Executive Director Nova Scotia Nurses Union Dartmouth, Nova Scotia
W. J. Pindera	Assistant General Secretary The Manitoba Teachers' Society Winnipeg, Manitoba
David Rice	Director of Research & Legislation B. C. Federation of Labour Vancouver, British Columbia
Robert Robichaud	Director of Research and Education Canadian Conference of Teamsters Ottawa, Ontario
Iona Robinson	Coordinator of Education Ontario Nurses Association Ottawa, Ontario
Anne Scotton	Assistant Director Canadian Studies Officer Association of Canadian Community Colleges Toronto, Ontario
Susan Sherwin	Member, Faculty Association Dalhousie University Halifax, Nova Scotia
Harold Snow	Professional Officer, Collective Bargaining Canadian Association of University Teachers Ottawa, Ontario
Harold Stafford	Director of Education Atlantic Region Canadian Labour Congress St. John, New Brunswick
Beverly Suek	Assistant Regional Director Central Region Labour Canada Winnipeg, Manitoba

Lynn Thornberg	Industrial Training Officer Confederation College Thunder Bay, Ontario
Edward Vanderkloet	Executive-Secretary Christian Labour Association of Canada Rexdale, Ontario
Larry Wagg	Director of Educational Services Canadian Labour Congress Ottawa, Ontario
Harry Waisglass	Director, Labour Studies Program McMaster University Hamilton, Ontario
Gordon Wilson	Director of Education United Auto Workers Toronto, Ontario
Peter Wilson	Regional Director Western Region Canadian Conference of Teamsters Vancouver, British Columbia
Robert Wilson	Regional Director Ontario Region Canadian Conference of Teamsters Toronto, Ontario

APPENDIX I.

Labour Education Questionnaire 4th Draft

Cover Sheet

A Name of interviewee: ______________________________

B Union: ___________________________

C Local: ___________________________

D Program/Conference/Event: _________________________

E Place of Event: ____________________

F Date of Event: _____________________

G Instructor/facilitator/organizer: ___________________

H Date of 1st call __________________ Tel.# ______________

2nd call __________________ Tel.# ______________

3rd call __________________ Tel.# ______________

4th call __________________ Tel.# ______________

I Notes and reminders/reasons for refusal or termination:

____

____

____

____

J Interviewer: _________________

K Time interview started: __________

L Time interview ended: ____________ Time: __________

Introduction

________________________ of ________________________
(name of contact person) (name of union/local)

has given me your name as someone who has been involved in an educational conference or program related to ________________ (insert topic) run by __________________ (above name or other). I am __________________ and I am calling from the Ontario Institute for Studies in Education in Toronto. We are involved in studying labour education and trade union programs across Canada. Our study is funded by several large unions as well as by various government sources. We would like to get your opinions about the value of the educational program in which you were involved.

1. Would you be willing to give us about 20 minutes of your time to answer some questions about your experiences in the labour education program? 1-1

YES ( ) → Q#2 NO ( ) 1-2

If "NO" ask: Is there another time that would be more convenient, or another telephone number I could call you at?

YES( )--(record) appointment time and date: 1-3

____

telphone number: ________________

NO( )--inquire why? ________________________ 1-4

____

____

Thank respondent and go to next name.

2. There are no right or wrong answers to any of the questions I will be asking. We will be keeping your answers strictly confidential and anonymous. All of the reporting we do will be in the form of summary tables. If you would like to receive a brief summary of our findings later this year then at the end of the interview I will get an address from you to which we can mail it.

According to ____________________ (name from first line, above)

you were involved in a (course, conference, etc.) ____________________ (topic)

on ________________________. (date)

Is that correct? YES ( ) → Q#4 2-1

NO ( ) → Q#3 2-2

3. Is there some other conference or workshop which you attended to learn about ________________________

YES ( ) Could you give me some of the details about that? 3-1

Place ______________________

Date ______________________

Name of event ______________________

NO ( ) "Thank you for your time." 3-2

4. Was this the first labour education course in which you were involved?

YES ( ) → Q#6 4-1

NO ( ) → Q#5 4-2

5. What other ones did you attend in the last three years?

PROBE FOR TOPICS (NOT JUST NAME OF CONFERENCE OR TITLE OF WORKSHOP).

____ 5-

____ 5-

____ 5-

6. Thinking about the program/course/conference dealing with

______________________, how did you select that particular
(insert topic)

educational event?

DO NOT READ LIST. CHECK ANY MENTIONED.

( ) 1. Supervisor suggested I go to it. 6-1

( ) 2. Went with a friend or working colleague (i.e. on an annual "conference outing"). 6-2

( ) 3. Read about it in a Union or Association publication and decided to go. 6-3

( ) 4. Nominated by co-workers to attend. 6-4

( ) 5. Invited to go by Union or Association executive. 6-5

( ) 6. Decided to go to further my education. 6-6

( ) 7. Decided to go to further my role in the union (Association). 6-7

( ) 8. Other: ______________________________ 6-8

______________________________ 6-

7a. How was your participation in this event funded?

DO NOT READ LIST. CHECK ANY MENTIONED.

( ) Paid for it myself. 7-1

( ) Paid for part of it myself. 7-2

→ ASK: What about the rest of the costs?

____ 7-

( ) Other: ____________________________________ 7-

____

7b. How was the event funded?

DO NOT READ LIST. CHECK ANY MENTIONED.

( ) Association or union dues. 7-6

( ) Labour Education Program. 7-7

( ) Federal Grant. 7-8

→ ASK: Which ministry? __________________________ 7-

( ) Other: ____________________________________ 7-

8. In some of our other studies of labour education, union members have mentioned a large number of things that might have been affected through their attendance and participation in various events. Thinking specifically about the event we have been discussing ____________________, would you listen to each of the following statements and tell me whether each is TRUE for you or FALSE for you or whether you are UNCERTAIN.

ROTATE START POINT	TRUE	FALSE	UNCERTAIN	
a) Increased your knowledge about the topic being presented.	( )	( )	( )	30-
b) Made you more aware of other unions' problems.	( )	( )	( )	31-
c) Increased your understanding of employees' rights.	( )	( )	( )	32-
d) Helped your family to appreciate union issues.	( )	( )	( )	33-
e) Increased your self-confidence.	( )	( )	( )	34-
f) Helped you to perform your role in the union.	( )	( )	( )	35-
g) Increased your interest in local union issues.	( )	( )	( )	36-

READ--There are just a few more items in this list. Are there any general comments you would like to make at this time about this attempt to study the value of trade union education? NO ( ) 37-2

RECORD VERBATIM: ______________________________________ 38-

____

____

______________________________________ ("Thank you")

Q.8 cont'd

READ--Returning now to the rest of our list, are these statements TRUE for you, FALSE for you, or are you UNCERTAIN about them?

	TRUE	FALSE	UNCERTAIN	
h) I was able to go back to my union and instruct others in the topic.	( )	( )	( )	39-
i) What I learned and experienced had an effect on my community.	( )	( )	( )	40-
j) I had a chance to form good relationships with other union members.	( )	( )	( )	41-
k) I feel more positive about management's position as a result of the course.	( )	( )	( )	42-
l) I want to attend more labour education events.	( )	( )	( )	43-

9. Did you feel any differently about your job after this program?

YES (   ) 9-1

↳ In what way? ______________________ 9-

____

____

NO (   ) 9-2

10. Did your position in your union (or association) change in any way as a result of this event?

YES (   ) 10-1

↳ In what way? ______________________ 10-

____

____

NO (   ) 10-2

11. What other labour education activities are carried out by your local (or chapter)?

YES (   ) 11-1

↳ Can you give me an example? ______________________ 11-

______________________ → Q#12

NO (   ) → Q#13 11-2

12. Is the program relevant to what you want to know?

YES (   ) 12-1

NO (   ) 12-2

↳ What changes would you like to see? ______________________ 12-

____

____

13. Do you recall any TAPES (   ) FILMS (   ) or PRINT MATERIAL (   ) 13-3

that was used as part of the program? (Check any mentioned) 13-4 13-5

If YES: Do you recall the name of that (those) material(s)? 13-

Did you find the material useful to you?

YES (   ) Can you say how it has been useful? 13-

NO (   ) Can you say why it has not been useful? 13-

14. We are interested in contacting others with whom you have worked since the conference/workshop who might have noticed any differences in how you have approached union or labour problems. Do you think there are any of your colleagues that we could talk to about this, and could you give us the names of two or three that you think might be willing to talk to us in an interview sometime in the next week or so? NONE (   ) 14-2

Name	Address/Contact	
		14-3
		14-4
		14-5

READ--"Thank you for all of your time. We hope that these interviews will help to improve the funding and running of labour education programs across Canada. If you would like to recieve a brief summary of our findings I would be happy to take down an address so that we can mail it to you."

15-1

Does not want (   ) 15-2

APPENDIX J.

THE ONTARIO INSTITUTE FOR STUDIES IN EDUCATION
252 BLOOR STREET WEST, TORONTO, ONTARIO, CANADA M5S 1V6 TELEPHONE 923-6641
Department of Adult Education

November 5, 1981

Thank you in advance for completing the attached questionnaire. As Wally Pindera has indicated in his letter to you, OISE has contracted with Labour Canada to evaluate their Labour Education Program - a program in which they have provided approximately $15,000,000 to unions and associations, like yours, for the purposes of labour education. In our evaluation we are interested in obtaining information from as many persons as possible who have participated in labour education activities which have been funded in whole or in part by Labour Canada's funds. The results of this evaluation will be reported at the end of 1981 and will form part of the data which will be used to argue for the continuation or discontinuation of federal support for these activities. Your association has been selected as one of ten independent unions from over 100 which have been funded during the past five years. Each of these will be treated as a case study and your reactions, reported in tabular form (and hence anonymously), will be of great value in preparing our report.

We have provided a stamped self-addressed envelope so that you can return the completed questionnaire to us directly. If you do not wish to do so, you can send it back to Wally who will relay it to us.

Our reporting deadline is December 1.

David S. Abbey, Ph.D.
Project Co-director
Labour Education Project

APPENDIX J

The Manitoba Teachers' Society

We are interested in assessing the effects of your attendance at sessions related to labour education.

In our interviews with other members of unions and associations like yours, respondents have mentioned a large and varied number of things that might have been affected through their attendance and participation. Would you consider each of the following statements and indicate whether each is TRUE for you, FALSE for you, or whether you are UNCERTAIN.

	TRUE	FALSE	UNCERTAIN	
1. a) Increased your knowledge about the topic being presented.	( )	( )	( )	1-
b) Made you more aware of other unions'/associations' problems.	( )	( )	( )	2-
c) Increased your understanding of employees' rights.	( )	( )	( )	3-
d) Helped your family to appreciate union/association issues.	( )	( )	( )	4-
e) Increased your self-confidence.	( )	( )	( )	5-
f) Helped you to perform your role in your association.	( )	( )	( )	6-
g) Increased your interest in local union/association issues.	( )	( )	( )	7-
h) I was able to go back to my local and instruct others in the topic.	( )	( )	( )	8-
i) What I learned and experienced had an effect on my community.	( )	( )	( )	9-

Q.1 cont'd

	TRUE	FALSE	UNCERTAIN	
j) I had a chance to form good relationships with other association members.	( )	( )	( )	10-
k) I feel more positive about "management's" position as a result of the course.	( )	( )	( )	11-
l) I want to attend more labour education events.	( )	( )	( )	12-

2. Considering the above list would you identify the two items (outcomes) that were most important for you, personally. CIRCLE TWO: 13-

a b c d e f g h i j k l 14-

3. Would you select one of the two statements which you identified in question 2 and comment on it in terms of: What was it about the conference that made this outcome happen?: ____________________ 15-

____

____

4. Did you feel any differently about your role in the association after the conference?

NO ( ) YES ( ) In what way? 16-0

____ 16-

____

5. Did you feel any differently about your day-to-day job after attending the conference? 17-0

NO ( ) YES ( ) In what way?

____________________________________ 17-

____

6. Did your position in your association change in any way as a result of what you learned at the conference?

NO ( ) YES ( ) In what way? 18-0

____________________________________ 18-

____

7. Was this the first labour education course/workshop or conference which you attended? YES ( ) 19-9

NO ( ) Please list any others over the last three years. 19-0

____________________________________ 19-

____________________________________ 19-

____________________________________ 19-

____________________________________ 19-

8. Do you recall any TAPES ( ) FILMS ( ) or PRINT MATERIAL ( ) 20-1 20-2

that were used as part of the program? (Check any mentioned.) 20-3

If YES: Do you recall the name of that (those) material(s)?

____________________________________ 20-

____

Did you find the material useful to you?

YES ( ) Can you say how it has been useful?

____________________________________ 20-

NO ( ) Can you say why it has not been useful?

____________________________________ 20-

9. What was the primary factor that led you to attend the labour education portion of your conference?

____ 21-

____ 21-

10. Are you interested in learning more about labour education topics?

NO (   )   YES (   ) Which topics? 22-

________________________________ 22-

________________________________ 22-

11. Prior to this questionnaire and the accompanying letters, were you aware of any financial support received by your association for purposes of conducting labour education?   NO (   )   YES (   ) 23-0

If YES → What source were you aware of at that time?

(   ) Wasn't sure 23-1

(   ) Known source ____________________ 23-

____

12. Did participation at the conference cost you any money out of your own pocket? 24-0

NO (   )   YES (   ) About how much $__________ 24-

Primarily to cover the costs of __________ 24-

____

13. We are interested in contacting others with whom you have worked since the conference/workshop who might have noticed any differences in how you have approached association or labour problems. Do you think there are any of your colleagues that we could talk to about this, and could you give us the names of two or three whom you think might be willing to talk to us in an interview sometime in the next week or so? NONE ( ) 25-0

Name	Address or Phone Number	
______________	______________	25-1
______________	______________	25-2
______________	______________	25-3

14. Thank you for all of your time. We hope that these interviews will help to improve the funding and running of labour education programs across Canada. If you would like to receive a brief summary of our findings, we would be happy to mail one to you. Please provide a mailing address for this purpose.

Mr.
Mrs.
Miss
Ms ______________ 26-1
______________ 26-2
____
____
Postal Code _ _ _ _ _ _

THE ONTARIO INSTITUTE FOR STUDIES IN EDUCATION
252 BLOOR STREET WEST, TORONTO, ONTARIO, CANADA M5S 1V6 TELEPHONE 923-6641
Department of Adult Education

September 9, 1981

Mr. W. J. Pindera,
Assistant General Secretary,
The Manitoba Teachers' Society,
191 Harcourt Street,
Winnipeg, Manitoba
R3J 3H2

Dear Mr. Pindera,

This letter is a follow-up to our conversation in May in which I outlined the evaluation project which Dr. Alan Thomas and I have undertaken, at the Ontario Institute for Studies in Education, on behalf of Labour Canada. As you may recall, we have been asked to study the ways in which independent unions (i.e. those unaffiliated with such organizations as the CLC) have used the financial contributions from Labour Canada. While we have access to the programs, summaries and evaluation reports which you have filed with Labour Canada in Ottawa, we are most anxious to talk directly to some of the people who may have been involved in the actual educational events which the Federal funds have supported in whole or in part.

In order to complete our work during September, October and November of this year, we would like to obtain a list of approximately 20 individuals, drawn at random, who may have taken part in the labour education program(s) which the financial grant from Labour Canada to your union have supported. From this list, we will draw a smaller sample of people whom we will contact either by long distance telephone or through a personal visit from one of our research staff. The kinds of information we are seeking are summarized in the draft questionnaire which is attached to this letter. Our experience with this telephone interview format is that about 20 minutes of time are required to complete all the questions. Wherever possible, we will contact people outside their working hours at their home telephone. It would be very helpful, therefore, if you could provide us with either the individual's residential telephone number or last known address as that we can make contact as easily as possible.

All of the data in our work have been presented in tabular form so that individual responses cannot be identified. In December of this year we will send to you, for whatever use you may wish to make of them, the summary results of the work with your union. Approximately twelve unions have been identified as being illustrative of the more than one hundred independent unions which have received financial assistance from the Labour Education Program to date.

If there is anything further which we can do to clarify our request, please call me (collect) at the above number (Local 346), or our Research Officer, Ms. Dorothy MacKeracher (Local 359).

Yours sincerely,

David S. Abbey,
Labour Education Project,
Co-Director.

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APPENDIX L.

THE ONTARIO INSTITUTE FOR STUDIES IN EDUCATION
252 BLOOR STREET WEST, TORONTO, ONTARIO, CANADA M5S 1V6 TELEPHONE 923-6641
Department of Adult Education

Registered Mail

October 29, 1981

Mr. L.M. Strand, President
Association of University and
College Employees
Suite 901
207 West Hastings Street
Vancouver, B.C.
V6B 1J8

Dear Mr. Strand:

This letter is to confirm the main points of our telephone conversation of October 20. As I understand it you received our written request for permission to interview members of the Association of University and College Employees who had attended various activities funded by Labour Canada's Labour Education Program. In that letter, I explained that OISE had contracted with Labour Canada to perform an evaluation of their program. I understand that you took our request to your Executive Committee and that they, in turn, voted "by a fairly substantial majority" to refuse our request for the names and telephone numbers of appropriate "students". You also indicated that many of those voting had "qualms on reporting to government on the disposition of the funds received".

We regret this decision, of course. I would like to formally request a written statement outlining the reasons for the Executive's rejection of our request. You indicated that this would be forthcoming and we would like to be able to include it in our final report to Labour Canada which is now in preparation.

Yours sincerely,

David S. Abbey, Ph.D.
Project Co-director
Labour Education Project

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APPENDIX M

C.L.C. Labour Education & Studies Centre

STUDENT PROFILE

SCHOOL LOCATION: ______________________ NO. OF HOURS ______

COURSE: ______________________ DATE OF COURSE: ______

1.0 UNION INFORMATION

1.1 Name of Union ______________________ Local No. ______

1.2 Membership Size ______________ Monthly Dues ______

1.3 Is your Local affiliated to: (check applicable box(s))

- Labour Council ☐
- Provincial Federation ☐
- Other ☐

1.4 Number of years in Union ______________

1.5 Current Local Union position: (check each applicable box)

- Member ☐
- President ☐
- Vice-President ☐
- Secretary/Treasurer ☐
- Bargaining Committee ☐
- Occupational Health Committee ☐
- Grievance Committee ☐
- Public Relations (newsletter) ☐
- Education Committee ☐
- Women's Committee ☐
- Union Counselling ☐
- Job Evaluation Committee ☐
- Staff Relations ☐
- Employee Recovery Committee ☐
- Steward ☐
- Other ☐

(over)

1.6 Current Labour Council Position: (check each applicable box)

Delegate ☐
President ☐
Vice-President ☐
Secretary/Treasurer ☐
Occupational Health Committee ☐
Education Committee ☐
Union Counselling ☐
Employee Recovery Committee ☐
Women's Committee ☐
Other ☐

1.7 Position held in Local Union over past 5 years: (check each applicable box)

President ☐
Vice-President ☐
Secretary/Treasurer ☐
Bargaining Committee ☐
Occupational Health Committee ☐
Steward ☐
Job Evaluation Committee ☐
Staff Relations ☐
Education Committee ☐
Women's Committee ☐
Union Counselling ☐
Grievance Committee ☐
Employee Recovery Committee ☐
Other ☐

1.8 Position held in Labour Council over past 5 years: (check each applicable box)

President ☐
Vice-President ☐
Secretary/Treasurer ☐
Occupational Health Committee ☐
Education Committee ☐
Union Counselling ☐
Employee Recovery Committee ☐
Women's Committee ☐
Delegate ☐
Other ☐

1.9 Total number of Union meetings attended over the past year:

1 - 3	4 - 6	7 - 9	10 - 12	More
☐	☐	☐	☐	☐

1.10 Union courses taken: (check each applicable box)

	Weekend	Week-long
Collective Bargaining	☐	☐
Steward Training	☐	☐
Basic Labour Law	☐	☐
Union Administration	☐	☐
Leadership Skills (psychology & human relations)	☐	☐
Occupational Health & Safety	☐	☐
Arbitration	☐	☐
Union Counselling	☐	☐
Corporate Structure & Finance	☐	☐
Instructor Training	☐	☐
Equal Opportunities for Women	☐	☐
Bargaining Issues for Equality	☐	☐
Affirmative Action	☐	☐

(over)

1.10 Union courses taken (continued)	Weekend	Week-long
Employee Recovery Training	☐	☐
Labour History	☐	☐
Parliamentary Procedure	☐	☐
Public Speaking	☐	☐
Other	☐	☐

2.0 PERSONAL DATA

2.1 Male ☐ Female ☐

2.2 Marital status: Married ☐ Single ☐ Single Parent ☐

2.3 Age:

15 - 20	21 - 25	26 - 35	36 - 45	46 - 55	56 - 65
☐	☐	☐	☐	☐	☐

2.4 Language: (check each applicable box)

	Read	Write	Speak
English	☐	☐	☐
French	☐	☐	☐
Other	☐	☐	☐

3.0 EMPLOYMENT

3.1 Present Occupation: ____________________________

3.2 Number of years with present employer: ______________

3.3 Current hourly rate: $______________

3.4 Number of hours in work week: ______________

4.0 EDUCATION (check each applicable block)

4.1 Elementary:

Grades	Grades	Grades
1 - 3	4 - 6	7 - 8
☐	☐	☐

4.2 Secondary:

9 - 10	11 - 12	13
☐	☐	☐

4.3 Post-Secondary: (University or College full time)

1 year	2 years	3 years	4 years	More
☐	☐	☐	☐	☐

4.4 University or College Extension or part time:

1 - 2 courses	3 - 4 courses	5 - 6 courses	More
☐	☐	☐	☐

4.5 Correspondence:

1 - 2 courses ☐

4.6 Labour College of Canada:

Residence Programme	Correspondence Courses
☐	☐

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APPENDIX N.

Note on classification of Expenditures:

The classification system used in this report was derived from that used by Labour Canada as part of the evaluation and reporting system by which Independent Labour Organizations described their projects.

Each category identified as an "Expense Item" includes a number of sub-categories, as follows:

Administration:	Library acquisitions
	Messenger, Express and Freight
	Postage
	Printing, Photocopies, etc.
	Rental of space
	Rental or purchase of equipment
	Secretarial Services
	Stationary and Supplies
	Telephones, Telegrams, etc.
	Translation Services
	Personnel salaries and benefits
	Miscellaneous
Educational Material:	Preparation and/or Purchase of materials
	Preparation and/or Purchase of teaching aids
	Promotional material
	Production of audio-visual materials
	Rental and/or Purchase of audio-visual equipment
Instructors and Consultants:	Contracting of external advisors, consultants, etc.
	Fees paid in relation to the preparation of courses and/or materials
	Expenses for consultants, resource persons, instructors
	Salaries and benefits for in-house instructors
	Expenses for Advisory Committees
Student Wages & Benefits:	Payment of benefits to course participants
	Transfer payments to locals for participants
	Wage recovery payments
	Scholarships
Training & Related Expenses:	Training of instructors
	Production of course materials
	Staffing for courses
	Rental of space
	Fees paid to external instructors
Travel, Meals & Lodging:	Meals and lodging for students and/or instructors
	Travel costs for students and/or instructors

APPENDIX O.

Note on classification of educational events by topic:

The classification system used in this report was derived from that used by Labour Canada as part of the evaluation and reporting system by which Independent Unions described their projects.

Each category includes a number of sub-categories, as follows:

Collective Bargaining:	Arbitration
	Bargaining process
	Certification
	Conciliation
	Contract administration
	Contract interpretation
	Contract proposal writing
	Grievance procedures
	Management rights
	Mediation
	Preparation for bargaining
	Rights of 3rd party in industrial disputes
	Trends in collective bargaining
Communication:	A/V tapes
	Communication structures
	Conduct of meetings
	Films
	Labour Journalism
	Parliamentary procedures
	Publications
	Public relations
	Public speaking
Conditions of work:	Effects of automation
	Flextime
	Job description
	Job environment
	Job evaluation
	Job security
	Participatory decision-making
	Pre-retirement planning
	Quality of work life
	Relocation of workers
	Women in the workforce
	Work schedules

Health and Safety:	Accident prevention Alcohol and drug abuse Health and safety hazards Occupational diseases Safety kits Medical services Use of safety equipment Threshold limits and standards
History of the Labour Movement:	Central labour organizations Federations of labour Labour councils Union history Union policies Union structures Union finances
International Scene:	Foreign trade and tariffs International Conventions (ILO) Research on conditions of work abroad Workers exchange International labour organizations Multinational corporations and cartels
Labour Legislation:	Human rights Industrial Relations and Disputes Investigation Act Labour code Labour standards Labour Relations Board Minimum wages Social and welfare legislation Unemployment Insurance Regulations Unfair labour practices Workmen's Compensation Act
Labour's Role in the Community:	United Appeal Voluntary services Social and community programs Union counselling
Social, Political and Economic Affairs:	Cost of living Economics Government's role Inflation factors Labour's role in society Presentation of briefs

Training and Education: Adult education techniques
Information to immigrant workers
Leadership courses
Negotiation skills
Skill improvement opportunities
Tradesman qualifications
Training of Instructors
Training of Shop Stewards
Training of union members
Union administration

Welfare Programs: Death benefit plans
Dental plans
Disability plans
Group insurance plans
Health benefit plans
Life insurance plans
Pension plans
Registered savings plans
Social welfare
Unemployment (layoffs)
Workmen's compensation
Paid educational leave

Others: Research activities
Surveys

APPENDIX P.

Participant Evaluation of LESC Programs (Prairie Region): 1979-80, 1980-81

The following is a summary report of course evaluations completed by participants in selected programs conducted by the Prairie Region LESC during the third and fourth years of the LEP. The titles of the courses selected for this summary include:

Economics: Erosion of our Social Programs
Awareness '80
Instructor Training
Industrial Hygiene
Labour in a Changing Society

A total of 146 individuals completed evaluation forms at the end of these courses. The information, therefore, constitutes an immediate response to the course itself. Participants appeared to give replies based on the immediate outcomes of the course and to comment on issues which were uppermost in their minds at the time. For example, an individual may have mentionned only "increased personal confidence" as a primary benefit gained from the course. This answer should not be taken to imply that "increased knowledge of topic" was not also an outcome.

The evaluation form included six open-ended questions. Some participants gave more than one answer in any one question and some did not answer all questions. The responses for questions 1, 2 and 3 have been categorized and reported as percentages of those who actually answered the question.

Question 1: "What benefits, if any, did you as an individual gain from this conference?"

Number of responses = 144

69%	Increased knowledge of topic subject
47%	Increased knowledge of related subjects and social issues
23%	Increased knowledge of labour movement
19%	Increased personal confidence, skill and ability
14%	Increased sense of value of, and commitment to, labour movement

Question 2: "Will any of the information or personal knowledge you have received be of any benefit to your union? If yes, how?"

Number of responses = 133

38%	Will be more knowledgeable and skillful in dealing with this issue and educating/informing my local.
30%	With increased knowledge gained, have a greater sense of purpose in dealing with subject issue
29%	Knowledge of topic subject
24%	Greater understanding of how unions can deal with subject issue
2%	No benefit -- all these replies came from Awareness '80 program.

Question 3: "What areas of the conference did you find the most stimulating?"

Number of responses = 101

47%	My own participation/involvement and that of other group members in workshops, discussions, debates, etc.
27%	Subject area
19%	Contact with other unionists
19%	Speeches
9%	Films and tapes
13%	General -- instructor, etc.

Responses to questions 4, 5 and 6 were combined. Because of the nature of the questions and the ways in which they were answered by individuals, we have drawn out central tendencies and generalizations about the ways in which participants would like to see programs improved, changed or expanded in the future. The questions read as follows:

Question 4: "Were there any areas within the conference that you think might have been better presented?"

Question 5: "What areas of concern could be added to future courses of this nature?"

Question 6: "What did you think of the physical arrangements for the conference, i.e. classrooms, audio-visual materials, etc.?"

Climate Setting:

Conferences should strive to create a companionable setting. There should be social events to draw people together. As one participant commented: "It's so seldom that members from different unions get together. It's important to appreciate our brothers and sisters. We have much to talk about."

The list of conference delegates and their affiliations should be distributed at the beginning of the conference so people can get to know each other.

Content:

Equal time should be given to women workers and their occupations.

Conferences should deal with job satisfaction: that is, how work is organized and how to deal with fragmentation of jobs.

Design:

Strong support was expressed for participation and involvement of participants in each program:

- through more time in small workshops and discussions
- through arranging chairs in circle or semi-circle

Courses which rely on lecture format without the variety of films, tapes, discussions, etc. and too tiring and boring.

Resources:

Programs should include speakers from the host city or region, not just "experts" flown in from elsewhere.

Programs should include more women speakers.

Background information and the agenda/program plan should be made available to participants prior to the conference. This would make discussions more meaningful.

Publicity:

Notices and literature circulated prior to the conference should state more clearly what the course is to cover and how. This might increase attendance and give those not interested an opportunity to opt out before the conference begins.

APPENDIX Q

LIST OF AFFILIATES WITH EDUCATION OFFICERS

Unions

Amalgamated Clothing & Textile Workers
Brotherhood of Rail, Airline & Steamship Clerks
Canadian Airline Employees Association
Canadian Brotherhood of Railway, Transport & General Workers
Canadian Paperworkers Union
Canadian Union of Postal Workers
Canadian Union of Public Employees (8)
Communication Workers of Canada
International Association of Machinists
International Woodworkers of America
Letter Carriers Union of Canada
Service Employees International Union
United Automobile Workers
United Food & Commercial Workers Union
United Rubber, Cork, Linoleum & Plastic Workers
United Steelworkers Union of America (5)
National Union of Provincial Government Employees
British Columbia Government Employees Union
Alberta Union of Provincial Government Employees
Saskatchewan Government Employees Association
Manitoba Government Employees Association
Ontario Public Service Employees Union
Newfoundland Association of Provincial Employees
Nova Scotia Employees Association

Federations

Alberta Federation of Labour
British Columbia Federation of Labour
Manitoba Federation of Labour
New Brunswick Federation of Labour
Ontario Federation of Labour
Quebec Federation of Labour

Canadian Labour Congress - 15

Note: Omitted from list above: Public Service Alliance of Canada

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APPENDIX R

STAFF SALARY ESTIMATES

Summer School

Individual sample (Port Elgin week)

Salary	$ 576.92	(average $30,000 per annum)
Travel	100.00	
Hotel	160.00	
Food	168.00	
TOTAL:	$1,004.92	

The above sample would be basically accurate for all instructors at the Port Elgin Summer School. The only variations would be in travel (probably higher) and in salary which would vary slightly.

Consequently, for Port Elgin, the total instructor cost not charged to the CLC or Labour Education & Studies Centre would have been 5 instructors per week x 5 weeks x $1,004.92 = $25,123.

Similarly, the CLC Labour Education and Studies Centre ran four weeklong courses in Gimli, Manitoba, in which the instructor costs would have approximated $4,019.68.

APPENDIX S

CLC Labour Education & Studies Centre - Course Descriptions

STEWARD TRAINING

The course is a student-centred programme suitable for new and for more experienced stewards. Stewards will be introduced to the scope of their union work, grievance handling including grievance writing and case studies, how to reach the membership and educate our members, and how to relate a steward's work to the wider social and political activity of the labour movement. More experienced stewards will benefit from discussing these topics in greater depth; they will also get an introduction to effective speaking, parliamentary procedure and to the grievance arbitration process. Much use is made in the programme of film and audio-visual aids; there is also a strong emphasis on group discussion work.

INSTRUCTOR TRAINING

This programme is designed to give participants at all levels practical training in all areas related to instruction of basic (tool) courses at the local level. Special emphasis is placed on learning objectives, course preparation, basic techniques and the use of basic aids.

APPENDIX T.

THE ONTARIO INSTITUTE FOR STUDIES IN EDUCATION

DEPARTMENT OF ADULT EDUCATION

June 10, 1981

EVALUATION OF POST-SECONDARY PROGRAM

PLEASE ANSWER THE QUESTIONS BELOW AS COMPLETELY AS POSSIBLE. IF NECESSARY CONTINUE ANSWERS ON SEPARATE SHEET.

1) Has your Labour Studies program continued since 1978? Yes ☐ No ☐

2) Would you indicate the range of your Labour Studies program for 1980-81 and indicate if any of the following have increased, decreased or remained unchanged since 1978.

	increased	decreased	remained unchanged
number courses for credit?	☐	☐	☐
number courses for non-credit?	☐	☐	☐
number programs leading to certification?	☐	☐	☐
number other programs?	☐	☐	☐
number of participants?	☐	☐	☐

3) If there has been a change in the numbers of requests from Labour organizations for individualized programs?

Yes ☐ No ☐

Have they : increased ☐ decreased ☐

Has there been any change in the types of requests If yes, would you describe the change briefly, if possible.

4) Have you found alternative sources of funding for your Labour Studies program? Please indicate which of the following sources provide support for your current programs:

Own institution

Other government resources-

- Federal ☐
- Provincial ☐
- Municipal ☐
- Labour organizations ☐

Other: ______________________________
(Please specify)

5) In our preliminary evaluation, we found some concern about the duplication of services in Labour Education. We would like your comments on the most appropriate contributions you think your organization, as a formal educational institution, can make to Labour Education.

APPENDIX U.

PUBLICATIONS AND COURSES FUNDED WITH POST-SECONDARY CONTRIBUTIONS

Publications

Model Proposal to Study Interest In and Barriers To Participation in Labour Education Amongst Trade Unionists in Nova Scotia. Maritime School of Social Work, 1978.

Labour Education: A Bibliography of Selected Reading Materials Available at Libraries in New Brunswick. University of New Brunswick, 1978.

Videotape Teaching Aids - Case Studies of Union Organizing, Collective Bargaining, etc. Niagara College.

Bibliography on Labour Education - Canada, U.S.A., Great Britain. Ontario Institute for Studies in Education (in press).

Labour Education in Alberta. Athabasca University; Alberta Federation of Labour; Centre for Study of Post-Secondary Education, University of Alberta, 1979.

Bibliography of Government Reports and Documents Relating to Health, Safety and Compensation. Patterson and Neamton, Capilano College.

The U.I.C. Newsletter. Edited by Allan McLean, Bi-monthly, Capilano College. Subscription fee - $5.00.

Case Book. British Columbia Labour Code. Leo McGrady, Capilano College.

Case Book. Canada Labour Code. Stuart Rush, Capilano College.